SITE

Training Manual

TIPWeb IT

800-495-5993
www.HayesPortal.com

HAYES
Software Systems

© 2012
Version 2.5.0.0

TIPWeb-IT Login

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URL: _____

HAYES
Software Systems

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iTunes Store (Apple)

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INTRODUCTION LETTER

Hello & Welcome

... to the Hayes Software Systems TIPWeb-IT application!

If you are reading this, you have in your hand what we hope will prove to be a very useful training guide as well as a reference guide to assist you in answering the questions you have on a daily basis about the functionality of TIPWeb-IT.

For twenty plus years, Hayes Software Systems has been training persons just like you in the use of our software solutions for school administrators. We have made it our business to understand the instructional technology issues and challenges you face on a daily basis.

If you are attending one of our hands-on or webcast training sessions, you are being led by one of several of our experienced training staff. Our trainers are proficient in TIPWeb-IT and will be able to offer you real life examples and processes to assist you in applying the application to your situation.

This training manual is divided into **three sections**:

1. **Need to Know** *(white pages)*
   those topics for which you need a basic understanding to begin using the TIPWeb-IT site view

2. **Nice to Know** *(yellow pages)*
   those topics that will further enhance your use of TIPWeb-IT's more advanced functions

3. **In the Know** *(blue pages)*
   helpful report samples to quickly reference

Continued on next page

Don't Wait! Ask us!

This is your training time and we want you to get the most from it.

If you have a question, please do not hesitate to ask it right away.

Our trainers feel comfortable taking questions as you have them.

Don't let that question you have go unasked!

Each page of this training manual has information which quickly categorizes where in the application the content discussed on that page can be found. Located in the upper right-hand side of each page, there are icons and a written path directly under the icon.

The page header icons are listed below and symbolize the following TIPWeb-IT areas:

Hardware

Puchasing

Rooms

Staff

Students

Quick Links

Generic and/or Multiple TIPWeb-IT areas

For more information regarding different TIPWeb-IT areas, see the **Interface Introduction** and **Navigating the Application** sections of this training manual.

TRAINER BIOGRAPHIES

DEBBIE DISLER

Director of Customer Advocacy

In January of 2009, Debbie accepted the position of Director of Customer Support and Training where she continues to seek new and exciting methods of delivering training and providing awesome customer support.

She has been providing customer support and training for Hayes Software since 2000. She took on the coordination of on-site and Hayes sponsored participant centered training of our products and in 2006 was made the Program Director of Customer Support and Training.

Coming to Hayes with 15 years of experience working for a fast growing school district in the central Texas area, she spent 13 years as a district instructional materials coordinator and coordinator of the district's reporting of student, staff and financial data to the state education agency through the Public Education Information Management System.

While employed with the school district she purchased and implemented district wide, the use of the TIP DOS program, moving to the TIPWIN program when it was launched. She developed and conducted hands-on training for campus personnel and truly believes that training is the key to the success of any accountability program.

ALISON KOEN

Customer Support Specialist and Training Consultant

In January of 2011, Alison joined our team on a full time basis. She is one of the voices you will hear when you call in for assistance. She is an integral part in helping us to continue to develop our webcast training offerings and will continue to help us with our on-site trainings.

Some of you may already be familiar with Alison as she has worked part time for us during our busy seasons answering your questions and assisting with the development of our online help system for our TIPWeb-IM application.

Before coming to work for Hayes, Alison spent two years as the instructional materials coordinator at McNeil High School in Round Rock, Texas. Prior to that she spent time at St. Edward's University (SEU) in their Instructional Technology division where she designed educational websites for official SEU courses and faculty. She assisted in the training of staff and faculty who wished to learn how to use and design web based technology for their courses.

She has a wealth of practical experience and knowledge that she is excited to share with you.

DAN STEWART

Customer Support Specialist and Lead Training Consultant

Dan joined Hayes Software Systems in 2000 as a part-time Training and Consulting Specialist. Working in the education field for 24 years, all at the same fast growth school district in Texas, he retired in 2000.

As the district grew to 40,000 plus students, Dan was instrumental in setting up an instructional material warehouse, four different times, as growth forced the warehouse to relocate. He implemented the use of TIPWIN in the district and provided support to all campus textbook personnel. Having spent time in the classroom teaching as well as time at the district level managing instructional materials, Dan shares his expertise and ideas about accountability on all levels.

He has fast become our lead field trainer and consultant, offering his firsthand experience and use of our instructional material and instructional technology management programs to our customers.

DONNA LONG

Customer Support Specialist and Training Consultant

After over 30 years of training experience in a wide variety of fields, Donna joined the Hayes Software Systems training team. Her experience with TIPWeb began while working with a large school district in the Dallas/Fort Worth area. She supported the instructional materials coordinator in the set up of the district's warehouse as well as assisted numerous campuses in the implementation of the application.

Her move to East Texas in the later part of 2006 allowed her to begin contract work with Hayes as a tester of our TIPWeb-IM and TIPWeb-IT applications. Her organizational skills and knowledge of TIPWeb-IM led her to a ten month consulting contract through Hayes working with the largest school district in Texas. For this district, her assistance proved invaluable to the successful implementation of TIPWeb-IM.

Donna's commitment to meeting our customer's needs is unparalleled as evidenced in her enthusiasm and genuine desire to share her knowledge with each and every learner.

SUE HEDRICK

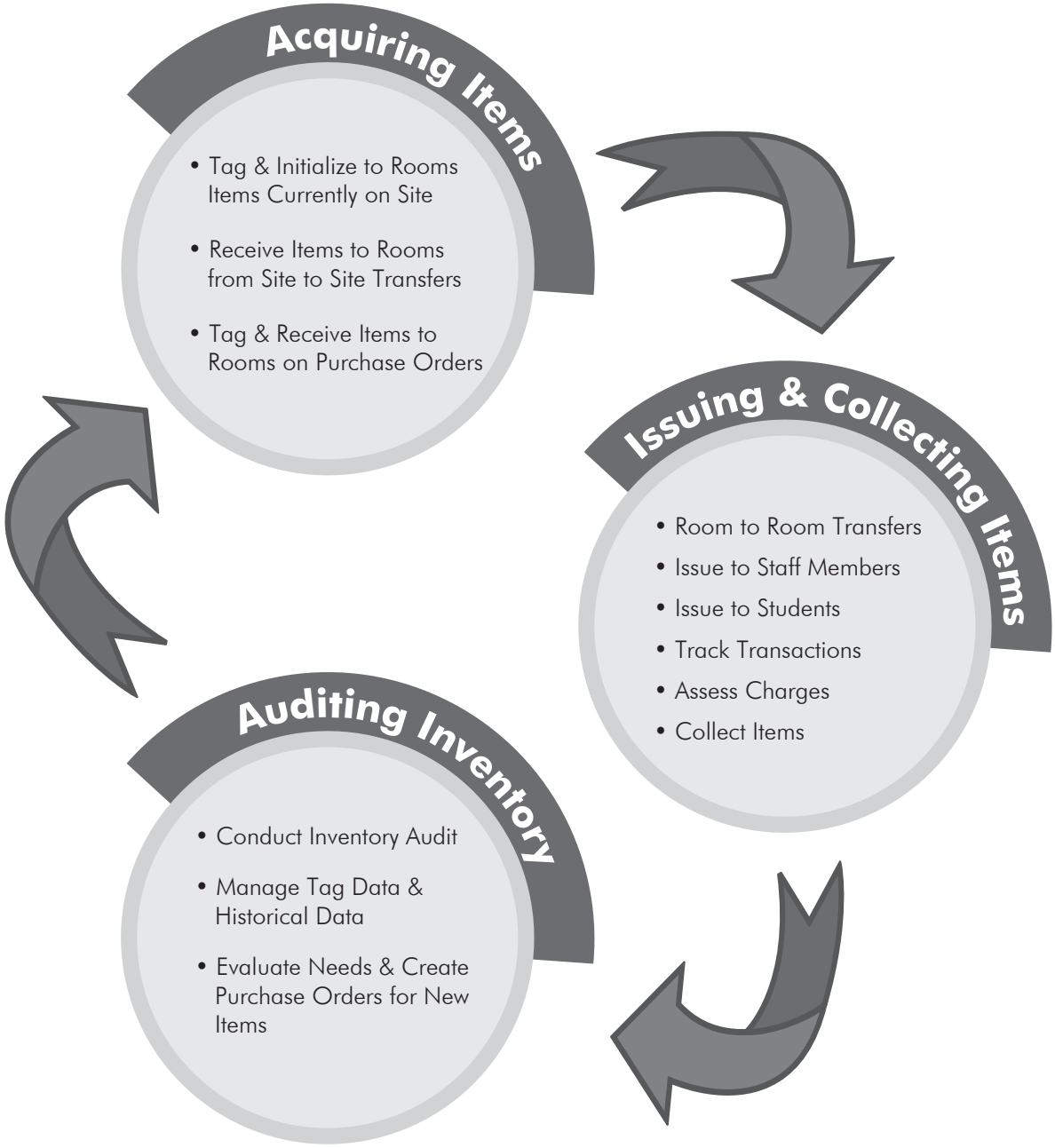
Customer Support Specialist and Training Consultant

Sue, originally from West Virginia, relocated to Texas and used her eight years of West Virginia public education experience working for a Houston area school district. She spent the next 24 years working in different capacities. The last eight years of her career were spent working in the instructional materials department, supporting the district instructional materials coordinator. This role taught her about the many facets of textbook management.

Sue has a passion for teaching. She became her district's TIPWeb-IM trainer and, each year that a new campus opened, she would help campus textbook staff setup their new instructional materials storage rooms and teach textbook accountability best practice policies.

In December of 2010, Sue chose to retire to join the Hayes Software Systems training team to continue doing more of what she truly enjoys, helping individuals achieve success in their jobs. She is excited to offer her experience with technology tools and instructional materials process and procedures to help each and every learner to achieve a high level of comfort with TIPWeb products.

TIPWeb-IT Application Overview


Acquiring Items
• Tag & Initialize to Rooms Items Currently on Site
• Receive Items to Rooms from Site to Site Transfers
• Tag & Receive Items to Rooms on Purchase Orders
Issuing & Collecting Items
• Room to Room Transfers
• Issue to Staff Members
• Issue to Students
• Track Transactions
• Assess Charges
• Collect Items
Auditing Inventory
• Conduct Inventory Audit
• Manage Tag Data & Historical Data
• Evaluate Needs & Create Purchase Orders for New Items

NOTES

Pin Point Instructional Technology with Tags

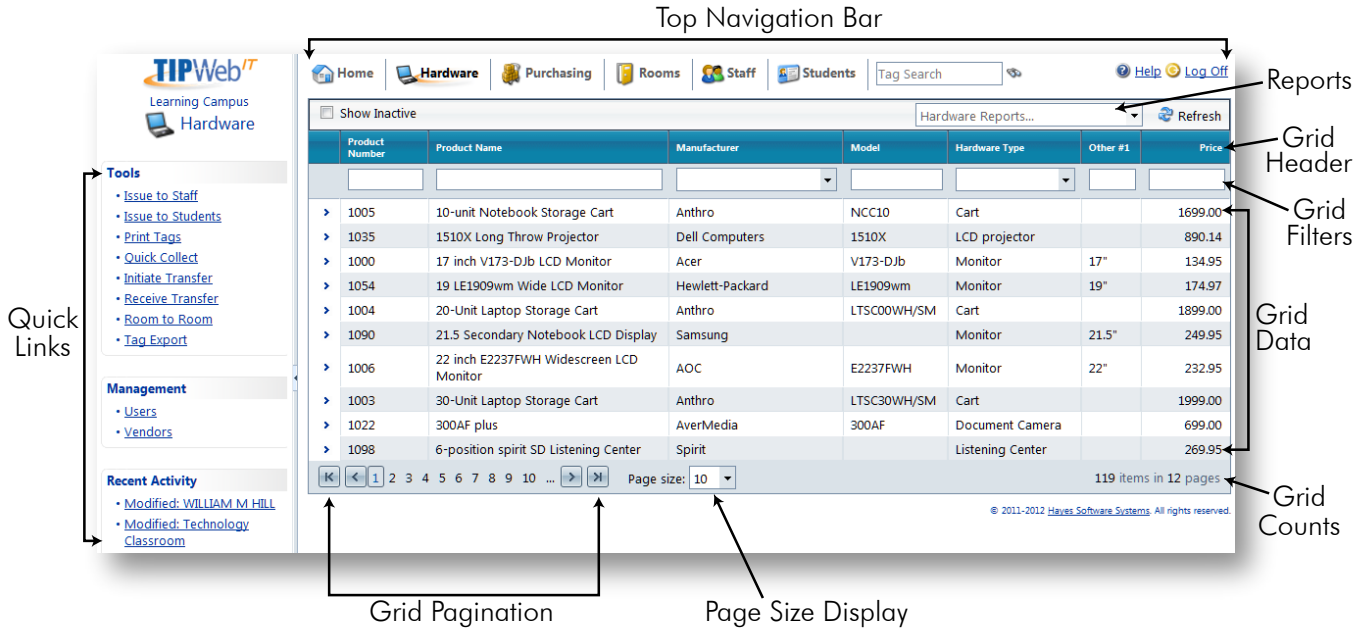
Tag Status
Ex: In Use, Available, Lost, etc...

Item Specific Information
Ex: Serial Number, Department Assigned, Projected Life, etc...

Funding Information
Ex: Purchase Date, Purchase Price, Funding Source, etc...

NOTES

Interface Introduction



Top Navigation Bar provides access to the main sections of TIPWeb-IT.

Quick Links provide areas of control respective to the TIPWeb-IT section.

Grid Pagination allows you to review data in manageable portions.

Page Size Display allows different grid sizes to display respective to the grid data.

Grid Header labels and provides sorting abilities for the columns/filters respective to the grid data.

Grid Filters allows you to reduce the grid data's results to display only the content by which you filter.

Grid Data displays data in a framework made up of columns and rows respective to the TIPWeb-IT section.

Reports displays the available reports respective to the TIPWeb-IT section.

Recent Activity displays the last several modified areas of TIPWeb-IT.

NOTES

Common Icons

We will introduce the specific meanings of all icons used in each area of TIPWeb-IT. Many icons appear frequently throughout the application. The following are the most common icons with which you will be interacting:

Add – adds something in regards to the area of TIPWeb-IT in which you are located

Edit – opens the selected item/individual/area to edit any applicable data

Save – saves selected information to be accessed at a later time

Custom Product Field – mouse over this icon and it provides additional information regarding the reviewed item

Accessories – mouse over this icon and it provides the accessories issued (sometimes clickable to allow for editing issued quantity)

Notes – mouse over this icon and it provides any notes entered

Refresh – refreshes the TIPWeb-IT area and returns the current screen to its original state

Print – opens a PDF version of the data you wish to view with the option to view, save, and/or print the respective data

Lock – locks the data entered into the respective data field in order to prevent the information from changing

Unlock – allows the respective data field to be altered with new data

Search – engages the search function

Did You Know?

Blue Grid Headers are clickable and sort the grid's data (ascending or descending) by the grid header item selected.

NOTES

Help

Contents Index Search Glossary
- Search -
Welcome
Basics
Getting Started
Administrative View
Site View
Reports
All Step by Steps
Home > Welcome
Welcome
TIPWeb IT
TIPWeb-IT is web-based Instructional Technology Management Software.
Contents Index Search Glossary
- Search -
Welcome
Basics
Getting Started
Administrative View
Site View
Hardware
Rooms
Rooms: Overview
Room Type
Rooms
Initialize Items to a Room
Quick Collect
Rooms Report
Room Inventory Report
Staff
Students
Issue/Collect Items
Purchases
Transfers
Tags
Reports
All Step by Steps
Home > Site View > Rooms > Rooms: Overview
Rooms: Overview
Rooms
The Rooms screen displays the physical location within a site to which an item is assigned. The Rooms grid allows you to search for active rooms (default) and inactive rooms (if "Show Inactive" is selected). There are multiple functions which allow a site to perform tasks pertaining to the creation of rooms, the altering of existing room details, and the reporting of inventory within each room.
Rooms Functionality
Rooms allows a site to perform multiple tasks pertaining to the creation of rooms and the inventory within each room.
Add a Record - add a room to this site
Show Inactive - when checked, allows a site to search for and view any room marked as inactive
Search Fields - located at the top of the Rooms grid, allows a site to search for a specific Room using the Room Number, Description, Room Type, and/or Other search fields
Edit - is located on each room's row and is the process by which a site

The **Help** icon is located in the upper right-hand corner of almost every TIPWeb-IT page.

The Help System launches in a new browser window and contains detailed step-by-step instructions to help you master the various concepts of TIPWeb-IT.

NOTES

Hayes Portal

The **Hayes Portal** button

on the TIPWeb-IT **Home** page will launch the Hayes Software Systems' Portal login screen. The URL for the Hayes Portal is: **www.HayesPortal.com**

Once you register, you will be able to access important and helpful TIPWeb-IT information such as: TIPWeb-IT News, Documents & Downloads, Training Opportunities, Application Updates & Enhancements, etc.

My Community Portal Info:

User Name: _____

Password: _____

NOTES

FIRST THINGS FIRST

Activity

True or False

In pairs or small groups, read the following statements and circle whether the statement is true or false.

1. The **Hayes Portal** is required in order to use TIPWeb-IT. TRUE FALSE

2. The clickable **blue grid headers** only sort the grid data in ascending order. TRUE FALSE

3. TIPWeb-IT **Tags** have barcodes on them and are scannable. TRUE FALSE

4. The **Quick Links** section of the screen is collapsible. TRUE FALSE

5. After limiting the data in a grid through filtering, **Refresh** refreshes the respective grid area and returns the current screen to its original unfiltered state. TRUE FALSE

6. TIPWeb-IT **Help** will open in another browser window. TRUE FALSE

7. The **Reports** drop down menu is located above the blue grid headers in the top left-hand corner of a majority of TIPWeb-IT screens. TRUE FALSE

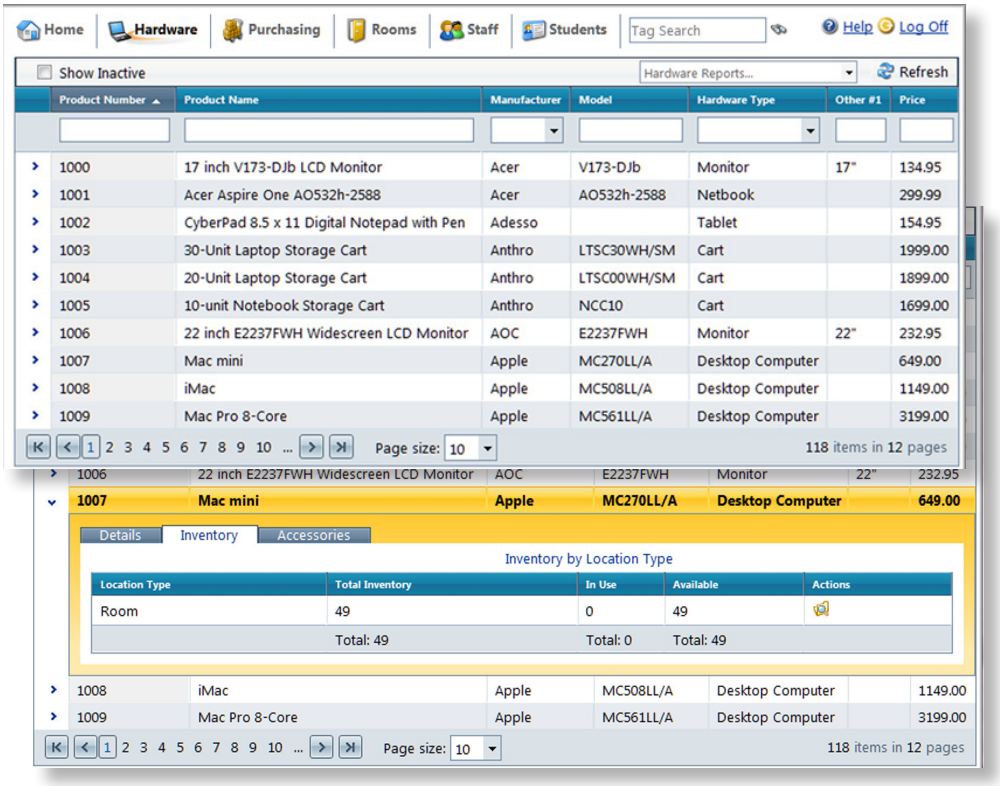
8. **Recent Activity**, located at the bottom of the **Quick Links** area, displays the last several areas of TIPWeb-IT which were modified by the user. TRUE FALSE

NOTES

Hardware Introduction

The **Hardware** page allows a site to view each district level tracked product. The district level adds the products to the Hardware database and identifies the required information to be tracked with each product.

Important pieces of information your district will be addressing include tracking the Serial Number, identifying Other fields (1, 2, & 3), and Custom fields (up to 4 per product).



The **Hardware** grid allows you to search for district tracked active products (default) and inactive products (if "Show Inactive" is selected).

Did You Know?

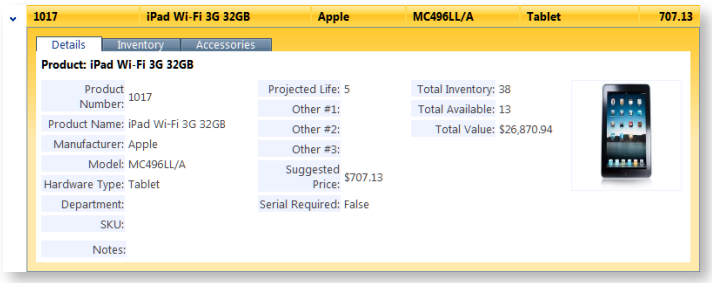
Each product's information and any accessory associated with a product (as entered by the district level administrative user) is available to review.

There is also a breakdown of the product's inventory count for your site by location type (room, staff, or student).

NOTES

Product Details Tab

The **Details Tab** displays each product's information as entered by the district level administrative user.



- **Product Number** - an auto generated field, however, the district level administrative user has the option to enter their own product number
- **Product Name** - name of the product
- **Manufacturer** - company which produces the product
- **Model** - manufacturer's specific version of the product
- **Hardware Type** - description of the different types or groups of hardware products (such as laptop, calculator, printer, cell phone, etc...)
- **Department** - an area to which a hardware product is associated (such as science, math, technology, etc...)
- **SKU** - defined by a retailer's coding system to distinguish individual products within the respective retailer's point-of-sale system
- **Notes** - displays any district level administrative user created notes
- **Projected Life** - number of years the district level administrative user deems this item to be usable
- **Other #1, Other #2, Other #3** - optional fields used to track miscellaneous information regarding the product
- **Suggested Price** - suggested replacement price for the product

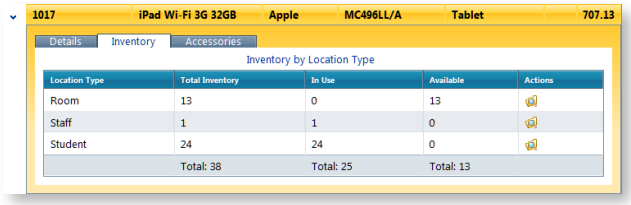
Continued on next page

NOTES

- **Serial Required** - true or false setting which requires a serial number be recorded when a tag is issued for this product
- **Image of Product** - picture associated with the product and displayed on numerous screens and various reports
- **Total Inventory** - quantity of the product as issued to this site.
- **Total Available** - quantity of the product which are tagged and currently in the status of "Available" (versus the status of "In Use")
- **Total Value** - calculated by the Total Inventory count multiplied by the Suggested Price

Product Inventory Tab

The **Inventory Tab** displays the product's inventory count for the site by location.



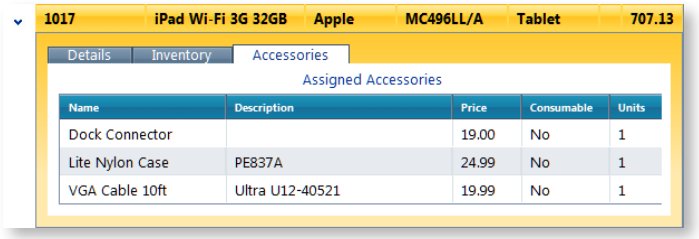
- **Location Type** - includes: Rooms, Staff, and Students
- **Total Inventory** - quantity of the product as assigned to this site by the district level administrative user
- **In Use** - quantity of the product which are tagged and currently in the status of "In Use"
- **Available** - quantity of the product which are tagged and currently in the status of "Available"
- **Actions** - allows you to view a more detailed breakdown of inventory counts by specific location

Continued on next page

NOTES

Product Accessories Tab

Accessories Tab - displays each accessory associated with the product. Accessories may be issued with a tagged item. The accessory is not tagged.



- **Name** - name of the accessory
- **Description** - description of the accessory as entered by the district level administrator user
- **Price** - replacement price of the accessory
- **Consumable** - no or yes designation of the district level administrator user to establish what is not expected to be returned when the tag/item is collected
- **Units** - number of units to be issued when the associated product is issued to room, staff member, or student (maximum number of units are set by the district level administrator user)

Continued on next page

NOTES

Hardware Reports

There are four hardware related reports in two areas which can be viewed/ printed from the **Hardware** page.

Hardware Report Drop Down area:

- **Product Catalog** - complete listing, in PDF format, of hardware products within TIPWeb-IT and has detailed information regarding each product (including product number barcodes)
- **Hardware Listing** - provides, in XLS format, a listing of all district administrator tracked products and the details of those items
- **Site Inventory Aging By Hardware** - provides, in XLS format, Hardware Type, Site Name, Location Type, Quantity, and Age (which is calculated by the purchase date of the hardware item)

Quick Links **Tools** area:

- **Tag Export** - provides, in CSV format, a complete listing of the tags and each tag's detailed information within TIPWeb-IT respective to your site

Did You Know?

Tag Export has an incredible amount of product information.

Tag Export is located under Quick Links **Tools**.

So it is available regardless of your location within the TIPWeb-IT application.

NOTES

Print a Product Catalog

The **Product Catalog** is a complete listing of hardware products within TIPWeb-IT. It has detailed information regarding each product, including a product number barcode from which to scan.

1. Click on Hardware, located on the top navigation bar.

2. Click on **Hardware Report Drop Down Menu**, located above the Hardware's blue grid header.

3. Select **Product Catalog** under the **--- PDF ---** menu subcategory.

4. The **Product Catalog** will open within a PDF reader. You may choose to print, save, and/or close the file using the PDF reader's controls

PRODUCT CATALOG

Hardware Type: Desktop Computer

Mac mini — Product No.: 1007
Manufacturer: Apple
Model: MC270LL/A
Hardware Type: Desktop Computer
Department:
Price: $649.00
Other 1:
Other 2:
Other 3:
SKU:
Projected Life: 4
Notes: (2.4GHz Core 2 Duo/2GB/320GB/SD/AP/BT)

iMac — Product No.: 1008
Manufacturer: Apple
Model: MC508LL/A
Hardware Type: Desktop Computer
Department:
Price: $1,149.00
Other 1:
Other 2:
Other 3:
SKU:
Projected Life: 4
Notes: (21.5" LED/3.06GHz Intel Core i3/2x2GB/500GB/4670/SuperDrive/WLM/kb)

Mac Pro 8-Core — Product No.: 1009
Manufacturer: Apple
Model: MC561LL/A
Hardware Type: Desktop Computer
Department:
Price: $3,199.00
Other 1:
Other 2:
Other 3:
SKU:
Projected Life: 3
Notes: (Two 2.4GHz Quad-Core Intel Xeon "Westmere" processors/6GB 1066MHz DDR3 ECC SDRAM (6x1GB)/ATI Radeon HD 5770 1GB/1TB 7200-rpm Serial ATA 3Gb/s/1.5x SuperDrive/Bluetooth 2.1+EDR)

Compaq EVO 51S Desktop Computer — Product No.: 1029
Manufacturer: Compaq
Model: Compaq EVO
Hardware Type: Desktop Computer
Department:
Price: $670.00
Other 1:
Other 2:
Other 3:
SKU:
Projected Life: 4
Notes:

Page 1 of 4

Date Printed: 12/19/2011

Did You Know?

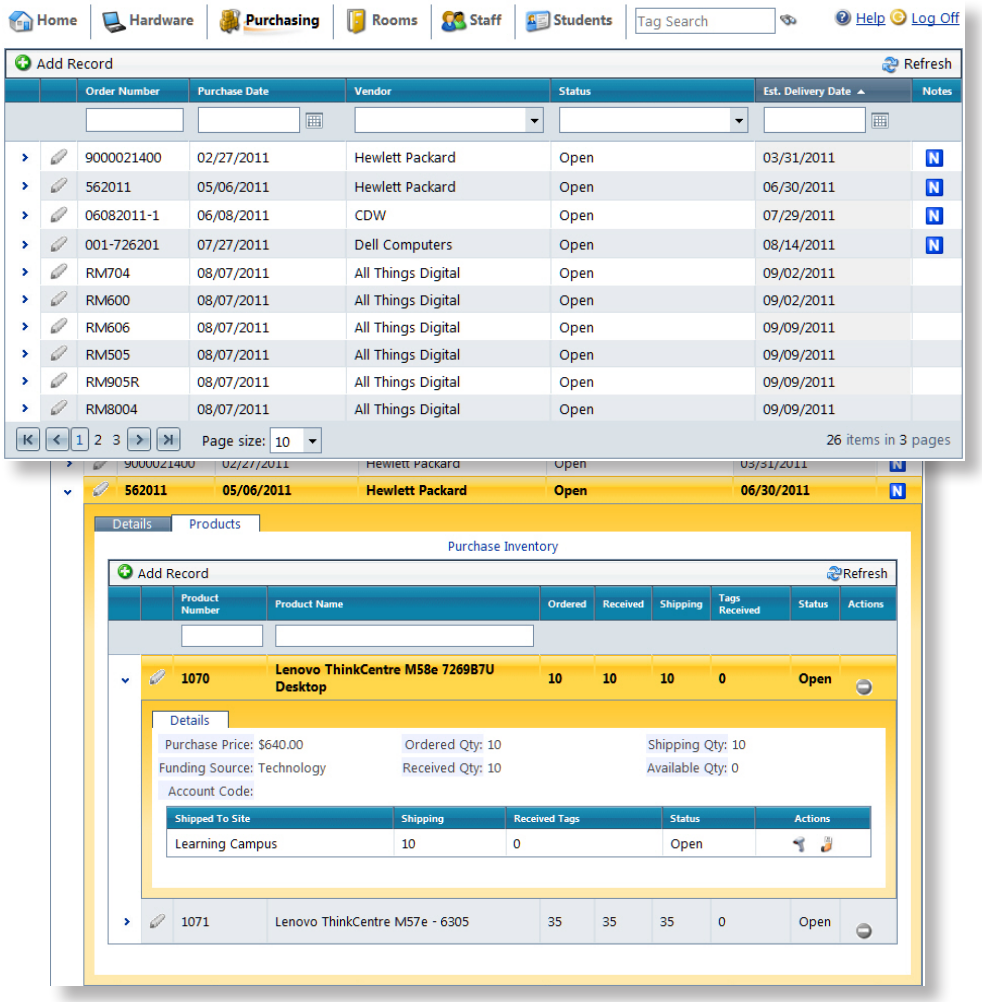
If you filter the items in the **Hardware** grid, the **Product Catalog** will reflect the items in the filtered grid view.

The **Product Catalog** can also be filtered by additional criteria from the PDF preview (such as: Department, Other #2, Other #3, Projected Life, and Notes)

NOTES

Purchasing Introduction

The **Purchasing** page allows a district level user or site administrator to create purchase orders, receive, and assign items to rooms while simultaneously recording essential purchasing data (purchase order number, purchase date, vendor, funding source, and quantity).



A purchase order may contain multiple products. Site level administrators can create purchase orders and add products to purchase orders, in addition to the site users' ability to print pick tickets and scan items to rooms.

Did You Know?

District level users create purchase orders and may add items to any existing site created purchase order.

This means items from one purchase order can be assigned/ shipped to multiple sites despite who created the purchase order.

NOTES

Purchasing Overview

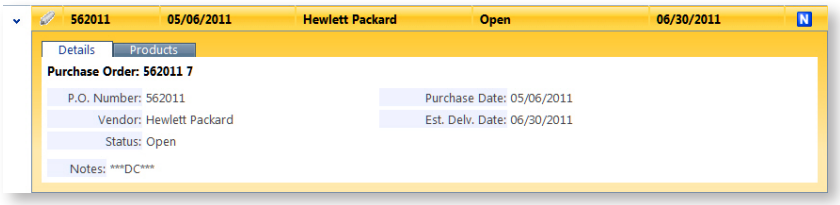
Add a Record - allows a site administrator to add a purchase order to TIPWeb-IT

Search Fields - located at the top of the Purchasing grid, allows searching for a specific purchase order using the Order ID, Purchase Date, Vendor, Status, Estimated Delivery Date, and/or Notes search fields

Edit - located on each site created purchase order's row, is the process by which a site administrator may add/edit the respective purchase order's details (district created purchase orders do not allow edits)

Purchase Order Details

Selecting a purchase order allows a user to view details for the respective purchase order. The **Details** tab displays each purchase order's information as entered by the creator of the purchase order (site administrator or district administrator).



- **Purchase Order ID** - an alpha and/or numeric purchase order number
- **Vendor** - name of an individual or a company who provides/supplies products to your district (similar to a supplier)
- **Status** - state of the purchase order (open purchase orders have full functionality, closed purchase orders prohibit editing the purchase order details and adding additional products)

Continued on next page

Did You Know?

Site Administrators are allowed to create purchase orders, add products to purchase orders, and receive items from a purchase order.

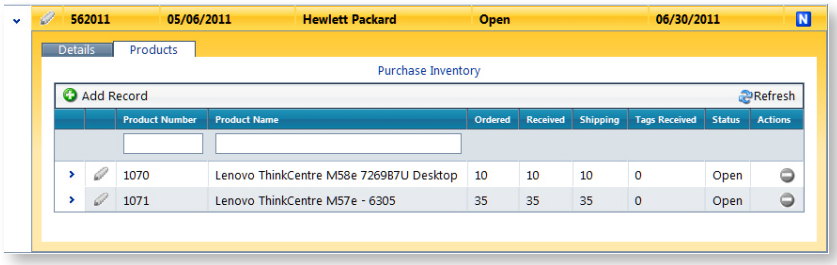
Site Users are only allowed to receive items from a purchase order.

NOTES

- **Purchase Date** - date the purchase is submitted to a vendor and it is also used to calculate the item's expiration date (may be the date the item's warranty goes into effect)
- **Estimated Delivery Date** - date the items on the purchase order are expected to be received from the vendor
- **Notes** - displays any notes entered by the creator of the purchase order and/or a district level user

Purchase Order Products

Selecting a purchase order allows a user to view the products associated with the respective purchase order. The **Products** tab displays each purchase order's product information as assigned by the creator of the purchase order and/or a district level user.



- **Product Number** - an auto generated field, however, the district level administrative user has the option to enter their own product number
- **Product Name** - name of the product
- **Ordered** - quantity of the product ordered from the vendor
- **Received** - quantity of the product received by the district from the vendor (site created purchase orders will automatically populate with the quantity ordered)
- **Shipping** - quantity of the product the district has shipped to respective sites (site created purchase orders will automatically populate with the quantity ordered)

Continued on next page

Did You Know?

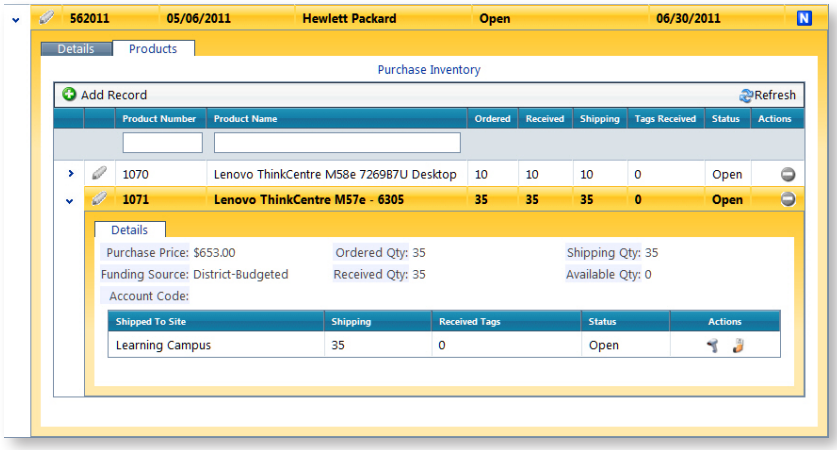
Products with a Received quantity of zero are available to **Delete** from a purchase order.

The delete icon will be grayed out (inactive) if a **Received** quantity is higher than zero.

NOTES

- **Tags Received** - quantity of the product tagged and issued to a room on the respective sites
- **Status** - state of the product within the purchase order ('Open' products have items left to be tagged, 'Closed' products have all been tagged)
- **Actions** - functions allowing the district level user to affect each product's processing within the respective purchase order
  - **Delete** - deletes any product assigned to the respective purchase order with no received items

- **Specific Product Information** (access by clicking on the product to display the respective product's **Details** tab):



  - **Purchase Price** - amount entered when adding the product to the respective purchase order (may be different than the product's suggested price)
  - **Funding Source** - the source of financial resources used to purchase an item
  - **Ordered Quantity** - quantity of the product ordered from the vendor
  - **Received Quantity** - quantity of the product received by the district from the vendor (site created purchase orders will automatically populate with the quantity ordered)

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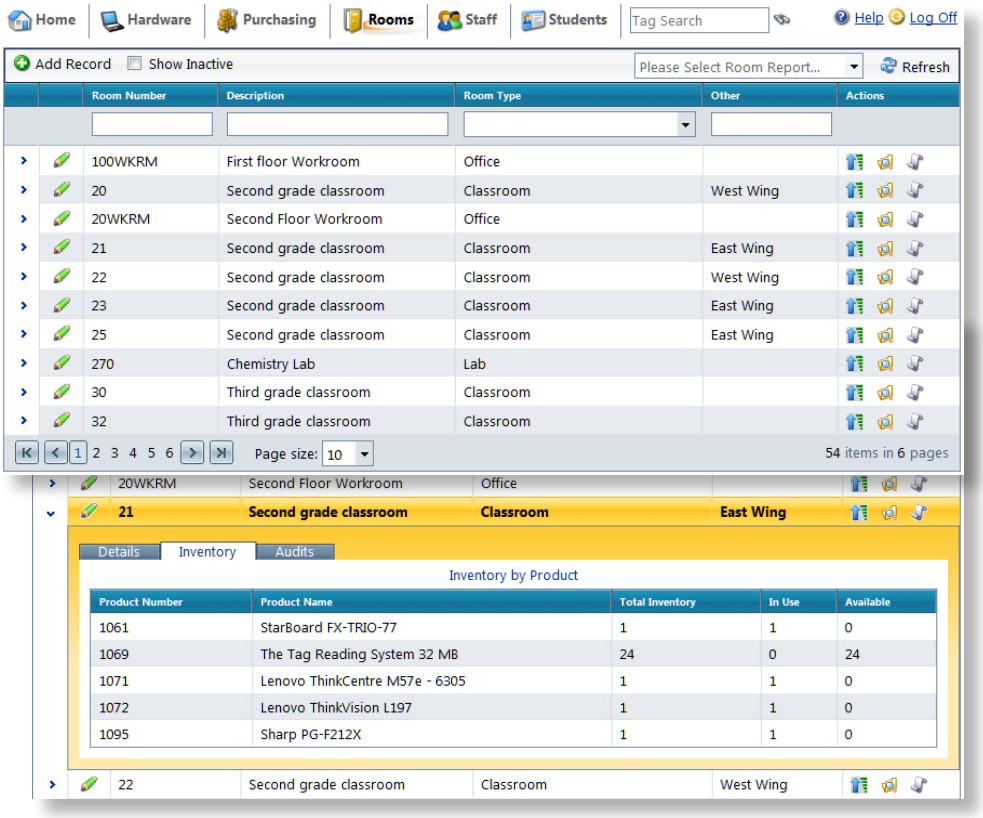
NOTES

- **Shipping Quantity** - quantity of the product the district has shipped to respective sites (site created purchase orders will automatically populate with the quantity ordered)
- **Available Quantity** - quantity of the product received by the district from the vendor and not yet shipped to a site
- **Shipped to Site** - located in the details grid, is a list of site names which have been shipped the respective product for this purchase order
- **Shipping** - located in the details grid, is the quantity of the product the district has shipped to respective sites
- **Received Tags** - located in the details grid, is the quantity of the product tagged and issued to a room on the respective sites
- **Status** - located in the details grid, is the state of the site's shipment ('In Transit' shipments have items left to be tagged, 'Closed' shipments have tagged all shipped items)
- **Actions:**
  - **Scan Tag into Inventory** - allows a user to receive an item from the purchase order into a room located on the respective site, while simultaneously assigning the tag and various product required fields (as set by the district administrator)
  - **Pick Ticket** - a list, in PDF format, detailing the items packaged, how many, and to which site those items where shipped (also serves as a packing slip for the respective site staff)

NOTES

Rooms Introduction

The **Rooms** page displays the physical locations within a site to which items are assigned.



The **Rooms** grid allows you to search for active rooms (default) and inactive rooms (if "Show Inactive" is selected).

There are multiple functions which allow a site to perform tasks pertaining to the creation of rooms, the editing of existing room details, and the reporting of inventory within each room.

Continued on next page

NOTES

Rooms Overview

Rooms allows a site user to perform multiple tasks pertaining to the creation of rooms and the inventory within each room.

Add a Record - add a room to this site

Show Inactive - when checked, allows a site user to search for and view any room marked as inactive

Search Fields - located at the top of the Rooms grid, allows searching for a specific Room using the Room Number, Description, Room Type, and/or Other search fields

Edit - is located on each room's row and is the process a site user may edit the respective room's details

Actions - functions allowing the site user to affect the room's inventory

- **Initialize** - is located on each room's row and is the process a site user assigns an item to the respective room (this is used when the item is pre-existing, do not use this for new items)
- **Inventory History** - displays the inventory history of the respective room, including: Product Number, Product Name, Tag, Status, Date, Source, Destination, Notes, and Custom Field Information
- **Room Inventory Report** - (see under **Room Reports** section)

Quick Links Tools:

- **Room to Room** - located under Tools Quick Links, allows items to be moved from one room to another room within a site through the process called Room to Room Transfers
- **Room Types** - located under Management Quick Links, is a process allowing creation of general categories used to label different kinds of rooms (Examples of Room Types might include: Classroom, Computer Lab, Storage, etc...)

  In addition to creating a Room Type under Management Quick Links, a site user may also create a Room Type "on the fly" while creating a new room.

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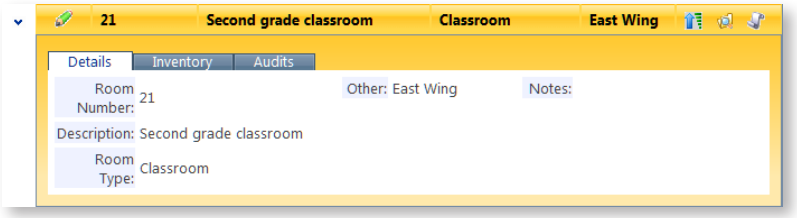
NOTES

Rooms Details Tab

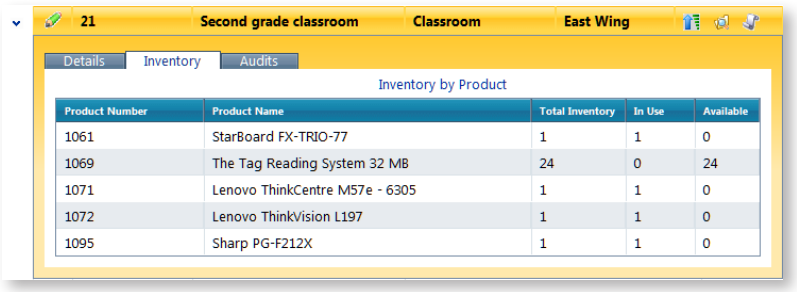
The **Details tab** displays each room's detailed information as entered by the site.



- **Room Number** - an alpha and/or numeric room number which corresponds with the site's floor plan
- **Description** - the name of the room (such as: Principal's Office, Library, Chemistry Lab, etc...)
- **Room Type** - general categories used to label different types of rooms within a site (such as: Classroom, Computer Lab, Storage, etc...)
- **Other** - an optional field which the site can use to track miscellaneous information regarding this room
- **Notes** - display any site created notes

Rooms Inventory Tab

The **Inventory Tab** - displays each room's inventory counts for the site by product.



Product Number	Product Name	Total Inventory	In Use	Available
1061	StarBoard FX-TRIO-77	1	1	0
1069	The Tag Reading System 32 MB	24	0	24
1071	Lenovo ThinkCentre M57e - 6305	1	1	0
1072	Lenovo ThinkVision L197	1	1	0
1095	Sharp PG-F212X	1	1	0

- **Product Number** - an auto generated field; however, the district has the option to enter their own product number

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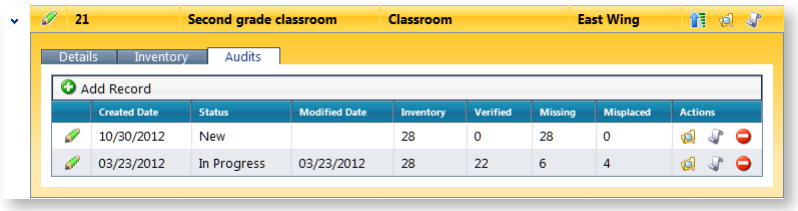
NOTES

- **Product Name** - name of the product
- **Total Inventory** - quantity of the product as issued to the site by the district
- **In Use** - quantity of the product tagged and currently in the status of "In Use" in this room
- **Available** - quantity of the product tagged and currently in the status of "Available" in this room

Rooms Audits Tab

The Audits tab displays each audit created for the respective room.



- **Add a Record** - add an audit to this room
- **Edit** - is located on each audit's row and is the process by which a site user may edit/add tags to the respective audit
- **Created Date** - displays the date the audit was created
- **Status** - state of the audit (New, In Progress, Finalized, and Closed)
- **Modified Date** - displays the last date the audit was modified
- **Inventory** - displays the inventory count of the tags located in the room
- **Verified** - displays the inventory count of the tags which were verified in the room
- **Missing** - displays the inventory count of the tags which were not verified to be located in the room
- **Misplaced** - displays the inventory count of the tags which were located in this room yet expected to be located in another room

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NOTES

- **Actions** - functions allowing the site user to affect the room's audit
  - **Audit Details** - allows functionality for Finalized audits to take action on Missing and/or Misplaced tags while displaying the room audit's details, including: Audit Status, Last Modified Date, Last Modified By, Created Date, Created By, Finalized Date, Finalized By, Audit Inventory counts, detailed product information, Tag Number, and Tag details
  - **Room Audit Summary Report** - is located on each audit's row and contains the respective room audit's details, including: Room Name, Room Number, Room Type, Site Name, Date Printed, Audit Status, Last Modified Date, Last Modified By, Created Date, Created By, Finalized Date, Finalized By, Audit Inventory counts, Tag Number, Expected Location, Audit Location, and Action Taken
  - **Delete** - allows the respective audit to be deleted (audits in the status of Closed are exempt from this function)

Rooms Reports

The **Rooms** page provides five reports in two areas to be viewed/printed.

Rooms Report Drop Down area:

- **Barcode IDs** - provides, in PDF format, a listing of the rooms on a site and their respective barcodes
- **Room Inventory Worksheet** - provides, in PDF format, a listing of the items within each room and their respective details including Tag, Product Name, Model, Hardware Type, Serial, Price and any information in the Other field
- **Room Listing** - provides, in XLS format, a listing of the rooms on a site

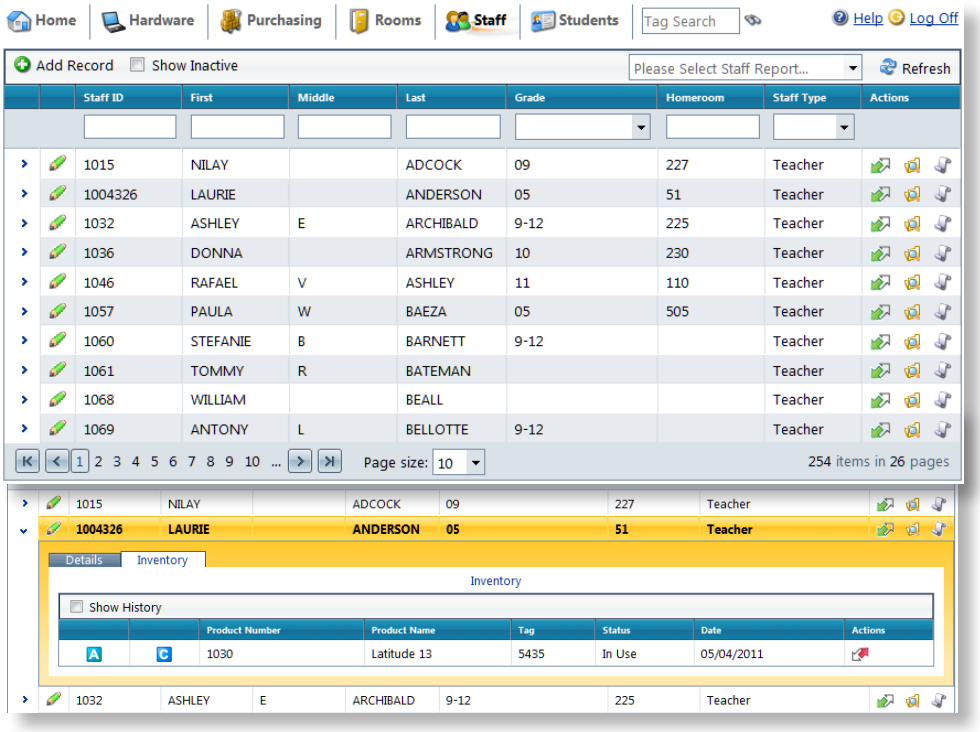
Rooms Grid area:

- **Room Inventory Report** - provides, in PDF format, inventory counts and detailed information regarding the product(s) and their respective Tags issued to each room.
- **Room Audit Summary Report** - located on the **Audit** tab, provides in PDF format, audit counts and detailed information regarding the tags and their respective audit states.

NOTES

Staff Introduction

Staff are the employees within a site to which items are issued.



The **Staff** grid allows you to search for active staff members (default) and inactive staff members (if "Show Inactive" is selected).

There are multiple functions allowing a site user to perform tasks pertaining to adding staff members, editing existing staff member details, issuing items to staff members, and reporting inventory and inventory history for each staff member.

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Did You Know?

Staff members are automatically imported/updated on a nightly basis from your district's student management system.

This significantly reduces the amount of data you would otherwise be required to manually add.

You can add new staff manually when necessary — you just do not have to do that very often.

NOTES

Staff Overview

Add a Record - add a staff member to this site

Show Inactive - when checked, allows a search for and view of staff members marked as inactive

Search Fields - located at the top of the Staff grid, allows a search for a specific staff member using the Staff ID, First Name, Middle Name, Last Name, Grade, Homeroom, and/or Staff Type

Edit - is located on each staff member's row and is the process by which a site user may add/edit the respective staff member's details

Actions - functions allowing the site user to affect or view status of items issued

- **Issue Inventory to Staff** - is located on each staff member's row and is the process by which a site assigns an item to the respective staff member
- **Inventory History** - is located on each staff member's row and displays the inventory history of the respective staff member, including: Product Number, Product Name, Tag, Status, Date, Source, Destination, Notes, and Custom Field Information
- **Staff Transaction Receipt** - (see **Staff Reports** section below)

Quick Links Tools:

- **Issue to Staff** - located under Tools Quick Links, is a process which allows you to quickly issue an item to staff members, in the status of "In Use"
- **Quick Collect** - located under Tools Quick Links, is a process to quickly collect items from staff members to a designated room
- **Staff Types** - located under Management Quick Links, is a process to create general categories used to label different kinds of staff members within a site (Examples of Staff Types might include: Teacher, Paraprofessional, Technical Staff, Administrative Personnel, etc...)

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Did You Know?

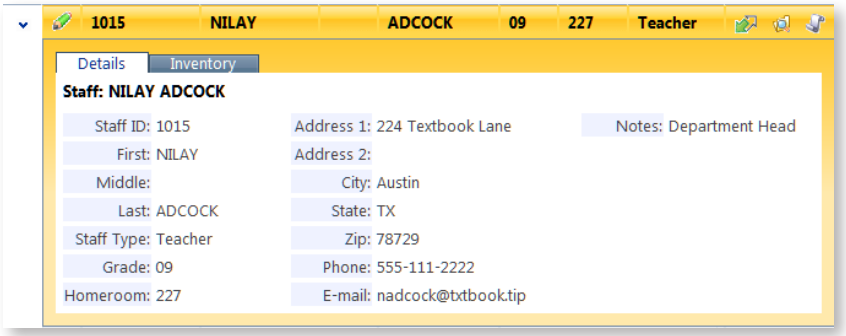
See the "How to Add Manually" section of this manual for more information on the following:

- **Add a Staff Type**
- **Add a Staff Member**

NOTES

Staff Details Tab

The **Details** tab displays each staff member's detailed information as imported into TIPWeb-IT from the student management system and/or as entered by the site user.



- **Staff ID** - an alpha and/or numeric identification number
- **First** - first name of staff member
- **Middle** - middle name of staff member
- **Last** - last name of staff member
- **Staff Type** - general categories used to label different types of staff members within a site (such as: Teacher, Technical Staff, Administrative Personnel, etc...)
- **Grade** - grade level to which the staff member is associated
- **Homeroom** - homeroom to which the staff member is associated
- **Address 1** - address of staff member
- **Address 2** - secondary address of staff member
- **City** - city of staff member
- **State** - state of staff member
- **Zip** - zip code of staff member
- **Phone** - phone number of staff member
- **E-mail** - e-mail address of staff member
- **Notes** - display any site user created notes

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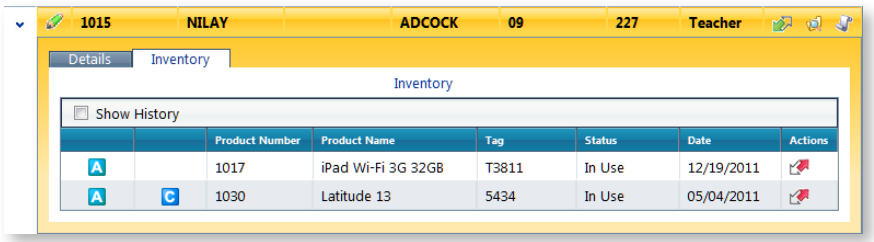
NOTES

Staff Inventory Tab

The **Inventory** tab displays each staff member's inventory counts by product.



- **Product Number** - an auto generated number; however, the district has the option to enter their own product number
- **Product Name** - name of the product
- **Tag** - unique identifier affixed to each item (which could be a district asset tag and/or a TIPWeb-IT created tag number) used to track individual items within TIPWeb-IT
- **Status** - displays the status of any item currently issued to the staff member (such as: In Use, Lost, Disposed, etc...)
- **Date** - displays the last modified date for the respective item
- **Actions** - functions allowing the site user to affect the item's status.
  - **Return Inventory** - collects the item from the staff member, returning it to the original source

Staff Reports

The **Staff** page provides three reports in two areas to be viewed/printed.

- **Staff Report Drop Down Menu** area:
  - **Barcode IDs** - provides, in PDF format, a listing of the staff members on a site and their respective barcodes

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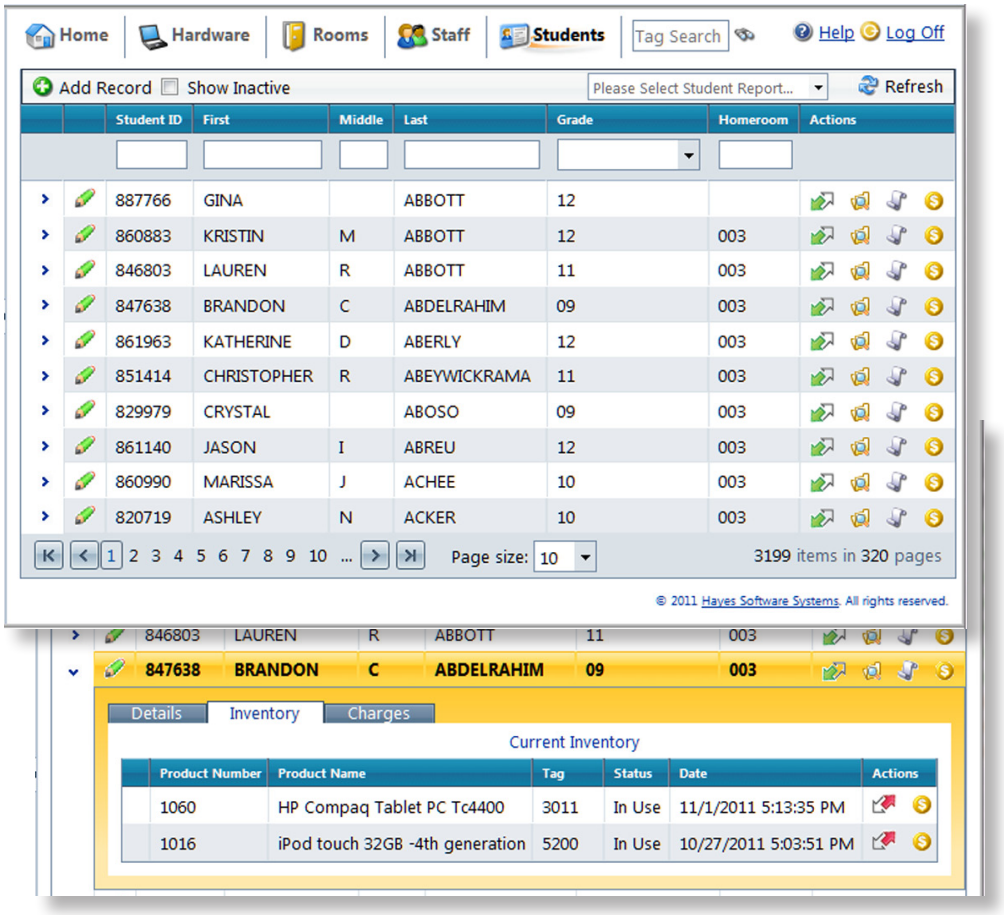
- **Staff Listing** - provides, in XLS format, a listing of the staff members on a site
- **Staff Inventory Status** - provides, in XLS format, a detailed listing of the staff members and their respective items by status

- **Staff Grid** area:
  - **Transaction Receipt** - is located on each staff member's row and displays, in PDF format, a listing of all products and the respective tag numbers issued to the staff member

NOTES

Students Introduction

Students are the learners within a site to which items are issued.



The **Students** grid allows you to search for active students (default) and inactive students (if "Show Inactive" is selected).

There are multiple functions allowing a site user to perform tasks pertaining to adding students, editing existing student details, issuing items to students, and reporting inventory and inventory history for each student.

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Did You Know?

Students are automatically imported/updated on a nightly basis from your district's student management system.

This significantly reduces the amount of data you would otherwise be required to manually add.

You can add a new student manually when necessary — you just do not have to do that very often.

NOTES

Students Overview

Add a Record - add a student to this site

Show Inactive - when checked, allows a search for and view of students marked as inactive

Search Fields - located at the top of the Students grid, allows a site user to search for a specific student using the Students ID, First Name, Middle Name, Last Name, Grade, and Homeroom

Edit - is located on each student's row and is the process by which a site user may add/edit the respective student's details

Actions - functions allowing the site user to affect the item's status

- **Issue Inventory to Student** - is located on each student's row and is the process by which a site user assigns an item to the respective student
- **Inventory History** - is located on each student's row and displays the inventory history of the respective student, including: Product Number, Product Name, Tag, Status, Date, Source, Destination, Notes, and Custom Field Information
- **Student Transaction Receipt** - (see **Student Reports** section)
- **Assess Charge** - opens the respective student's **Charges** tab where charges are assessed and managed

Quick Links Tools:

- **Issue to Student** - located under Tools Quick Links, is a process to quickly issue an item to students, in the status of "In Use"

Did You Know?

See the "How to Add Manually" section of this manual for more information on the following:

- **Add a Student**

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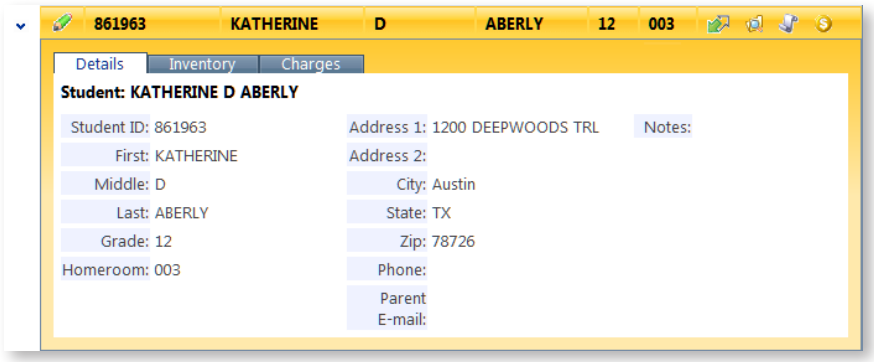
- **Quick Collect** - located under Tools Quick Links, is a process which allows you to quickly collect items from students to a designated room
- **Grades** - allows a site to add or edit site specific grade levels and the order in which the grade level is displayed in applicable drop down fields

Students Details Tab

The **Details** tab displays each student's detailed information as imported into TIPWeb-IT from the student management system and/or as entered by the site user.



- **Students ID** - an alpha and/or numeric identification number
- **First** - first name of student
- **Middle** - middle name of student
- **Last** - last name of student
- **Grade** - grade level to which the student is associated
- **Homeroom** - homeroom to which the student is associated
- **Address 1** - address of student
- **Address 2** - secondary address of student
- **City** - city of student
- **State** - state of student

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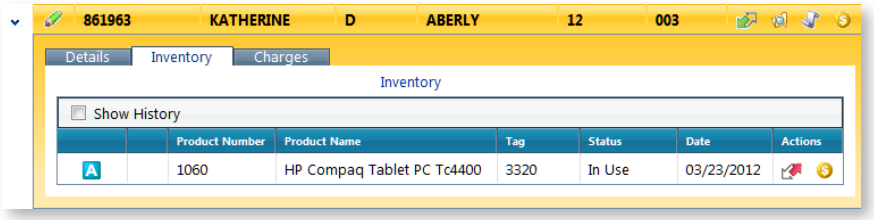
NOTES

- **Zip** - zip code of student
- **Phone** - phone number of student
- **Parent E-mail** - e-mail address of parent
- **Notes** - display any site user created notes

Students Inventory Tab

The **Inventory** tab displays each student's inventory counts by item. Product Number - an auto generated field; however, the district has the option to enter their own product number



- **Product Name** - name of the product
- **Tag** - unique identifier affixed to each item (which could be a district asset tag and/or a TIPWeb-IT created tag number) and used to track individual items within TIPWeb-IT
- **Status** - displays the status of any item currently issued to the student (such as: In Use, Lost, etc...)
- **Date** - displays the last modified date for the respective item
- **Actions** - functions allowing the site user to affect the item's status.
  - **Return Inventory** - collects the item from the student, returning it to the original source
  - **Assess Charge** - allows the site user to assess a charge related to the item

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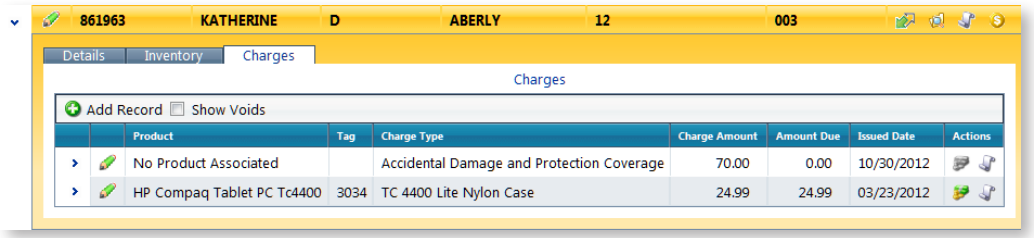
NOTES

Students Charges Tab

The **Charges** tab displays each charge the respective student has accrued. **Charges** are assessed when an item has been damaged and/or before an item is issued as a prerequisite for that item's issuance.



- **Product Name** - name of the product
- **Tag** - unique identifier affixed to each item (which could be a district asset tag and/or a TIPWeb-IT created tag number) and used to track individual items within TIPWeb-IT
- **Charge Type** - created by the district level administrative user categorizes charges and, depending on the settings, a site user may or may not; change the price of a charge type, or view percentages based on the product's replacement price
- **Charge Amount** - displays the amount of the assessed charge (this may or may not be changeable due to district level administrative settings)
- **Amount Due** - displays the remaining balance of the charge amount (a satisfied charge will display a zero balance)
- **Issued Date** - displays the date the charge was issued to the student
- **Actions** - functions allowing the site user to affect the charge
    - **New Charge Payment** - allows a site user to add a payment to the respective charge (partial or full payments)
    - **Charge Receipt** - (see **Student Reports** section below)

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NOTES

Students Reports

The **Students** page provides seven reports in two areas to be viewed/printed.

- **Student Report Drop Down** area:
    - **Barcode IDs** - provides, in PDF format, a listing of the students on a site and their respective barcodes
    - **Transaction Receipts** - provides, in PDF format, transaction receipts of all students to which items have been issued and their respective status
    - **Charge Listing** - provides, in XLS format, a listing of the students with assessed charges (satisfied and/or unsatisfied)
    - **Student Inventory Status** - provides, in XLS format, a listing of the students, the items issued to them, and the respective details of those items
    - **Student Listing** - provides, in XLS format, a listing of the students on a site
    - **Charge Activity Listing** - provides, in XLS format, a listing of the students, their respective charges (satisfied or unsatisfied), and any charge payments (valid or voided)

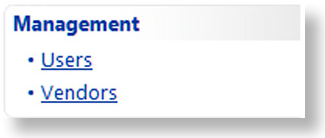
- **Student Grid** area:
    - **Transaction Receipt** - is located on each student's row and displays, in PDF format, a listing of all products and the respective tag numbers issued to the student
    - **Charge Receipt** - located on the **Charges** tab and displays, in PDF format, a listing of all charges assessed to the respective student

NOTES

Add Users

Users are the individuals who are granted access to TIPWeb-IT. Site users will obtain their user accounts from a TIPWeb-IT Site Administrator.

1. Click on **Users** under **Management** Quick Links.



2. Click on **Add Record**.

3. Enter the new user's details. Red fields are required information. Choose a **User Role** respective to their position within the site.

4. Click on **Save**.

Did You Know?

There are two levels of **Site User Roles**:

Site Administrators are not restricted from any functions within the site view to which the user is assigned.

Site Users are restricted from:

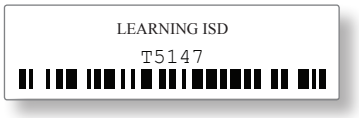
- Voiding Charges
- Creating Purchase Orders and adding Products to Purchase Orders
- User Management

NOTES

What are Tags?

Tags are the unique identifiers used to track the items in TIPWeb-IT. Tags are affixed to each item you wish to track.

Tags can be your district's currently affixed asset tags (unique identifiers) or the tags available to print within TIPWeb-IT.



Each TIPWeb-IT tag measures 1/2" x 1 3/4" and have barcodes for ease of tracking. 80 tags are printed per sheet of labels (3M Label #3100-Q or Avery Label #5167).

Did You Know?

The tag number/ bar code is the key to recording the location of an item.

It is important to use good quality tags.

The Avery 5167 or 3M 3100-Q are durable polyester labels and they work well for items not handled every day (like a ceiling mounted projector).

For items handled on a daily basis, such as laptops or tablets, invest in a more durable metal tag.

NOTES

Search for a Tag

Tag Search is located on the top navigation bar. It allows a user to search for a specific Tag and review details regarding that Tag, including:

Tag Details
- Tag number
- Serial Number
- Site
- Location
- Status (In Use or Available)
- Date Issued
- Tag Notes

Funding Information
- Inventory Type
- Order Number
- Funding Source
- Vendor
- Purchase Date
- Purchase Price
- Expiration Date

Product Information
- Product
- Product Number
- Hardware Type
- Manufacturer
- Model
- Replacement Price
- Product Notes
- Product Image

1. Click within the **Tag Search** field, located on the top navigation bar.

2. Enter the tag number (it can be made up of alpha and/or numeric characters).

3. Click on **Search** or select the **Enter** key on your keyboard.

4. The **Tag Information** window will appear and display the details of the tag.

5. If you wish to search for another tag, use the **Tag Search** field located at the top of the **Tag Information** window and repeat steps 2 through 4.

6. Click on to close the **Tag Information** window.

Did You Know?

Within the **Tag Information** window, you may have an icon to the right of the **Location** field.

This icon is clickable and will take you to the respective location displayed (**Staff, Students**, or **Rooms**). This icon will only appear if the tag you searched for is located on your site.

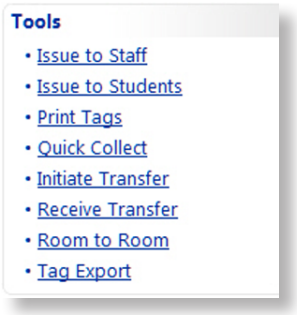
The **Product** field, under Product Information, also has a clickable icon to the right of it and it will take you to the **Hardware** page for the respective product.

This icon is always available.

NOTES

Print New Tags

1. Click on **Print Tags**, located in the Quick Links **Tools** menu.



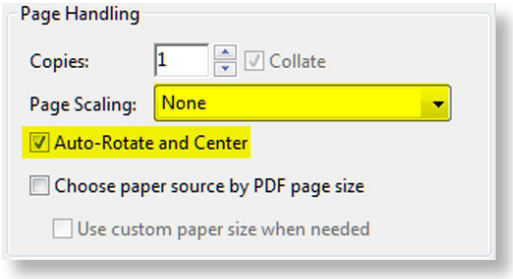
2. The **Tag Header** of the tag is customizable. Insert the desired text (consult your district level administrator before making changes).

3. Click on **Preview Tags** to test print the label alignment on a sample sheet. If the labels are misaligned, close the preview and use the **Margin Offset** controls to adjust them until they are printing correctly.

4. Enter the number of **Tags** you wish to print in the **Print Quantity** field.

5. Click on **Print Final Tags**.

6. Click on the PDF reader's print icon, review the print window, and click OK (see note →).



7. Click **Done** to close the **Print Tags** window.

IMPORTANT!

To print **TIPWeb-IT Tags**, the computer you are using must have a PDF reader installed (such as Adobe® Reader®).

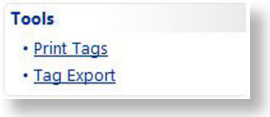
If you are using **Adobe® Reader®**, make sure the **Print Screen's Page Handling** settings are as listed below.

- **Page Scaling** must be set to **None.**
- **Auto-Rotate and Center** must be **checked**.

NOTES

Tag Export

The **Tag Export** is a complete listing of the tags within TIPWeb-IT respective to the site. This document opens as a CSV file. It has detailed information regarding each tag.



1. Click on **Tag Export**, located in the Quick Links **Tools** menu.

2. When the message appears asking "Do you want to open or save TagExport.csv ...", click on **Open**.

3. The **Tag Export** file will open within a spreadsheet program located on your computer (such as Microsoft Excel). You may choose to search, filter, sort, delete, save, and/or close the file within your spreadsheet program using your spreadsheet program's controls.

The Tag Export Includes:

Where each Tag is located:
- Site & Site ID
- Location & Location ID

What kind of item each Tag is tracking:
- Hardware Type
- Product Name & Number
- Product Description
- Model
- SKU
- Manufacturer
- 3 possible Product Custom Fields' information
- Suggested Price

Each Tag's specific information:
- Tag Number
- Active or Inactive
- Status
- Department Assigned
- 4 possible Tag Custom Fields' information
- Last Modified Date & by Whom
- Projected Life
- Expiration Date
- Tag Notes
- Serial Number

Each Tag's inventory & funding history:
- Inventory Type (Initial or Order)
- Order Number, if applicable
- Vendor, if applicable
- Funding Source
- Purchase Price
- Purchase Date, if applicable

NOTES

FIRST THINGS FIRST

Activity

Match Terms to Definitions

In pairs or small groups, match the terms to the definitions.

Misplaced ☐	☐ When checked, allows a search for and view of staff members, students, or rooms marked as inactive
Tag Number ☐	☐ The inventory count of tags which were located in the audited room yet expected to be located in another room
Charge Type ☐	☐ A Quick Links tool, allows items to be moved from one room to another room within a site
Product Number ☐	☐ The quantity of the product tagged and issued to a room on the respective sites
Location Type ☐	☐ An auto generated field, however, the district level administrative user has the option to enter their own number
Consumable ☐	☐ Categories of charges which can be assessed to students and/or items issued to students (created by a district administrator)
Tags Received ☐	☐ Includes: Rooms, Staff, and Students
Room To Room ☐	☐ Unique identifier affixed to each item (which could be a district asset tag and/or a TIPWeb-IT created number) and used to track individual items within TIPWeb-IT
Show Inactive ☐	☐ A yes or no accessory designation whether or not an accessory is expected to be returned when the respective tag/item is collected (established by a district administrator)

NOTES

Add a Room Type

Room Types are general categories used to label different kinds of rooms within a site. Examples of Room Types might include: Classroom, Computer Lab, Storage, etc...

1. Click on Rooms, located on the top navigation bar.
2. Click on **Room Types** under Quick Links **Management**.
3. Click on **Add Record**.
4. Enter the new room type's details. Red fields are required information.
5. Click on **Save**.
6. Click on to close the **Manage Room Types** window.

Did You Know?

Organizing your rooms by **Room Type** allows you to filter/sort your list of rooms by the established **Room Types**.

NOTES

Add a Room

1. Click on Rooms, located on the top navigation bar.
2. Click on **Add Record**.
3. Enter the room's details. Red fields are required information.

   If you wish to assign this to a **Room Type** which is not currently listed in the drop down menu, you may edit and/or create a **Room Type** by clicking on **Manage Room Types** to the right of the **Room Types** field.

4. Click on **Save**.

Edit a Room

1. Click on Rooms, located on the top navigation bar.
2. Search for and click on **Edit**.
3. Edit the room's details. Red fields are required information.
4. Click on **Save**.

Did You Know?

What if you wish to remove or delete a room once it is added?

A **Room** can be set as **Inactive**, if a site no longer wishes to see it in the **Rooms** grid and/or room reports.

To mark a room as **Inactive**, follow the instructions for editing a room.

While in the respective room's **Edit** screen, click on the box next to the **Active** field.

This will remove the check mark and make the room inactive.

Be sure to click on **Save** to save this change.

NOTES

Room Inventory Report

The **Room Inventory Report** provides inventory counts and detailed information regarding the product(s) and their respective **Tags** issued to each room.

1. Click on Rooms, located on the top navigation bar.
2. Filter the **Rooms** grid to locate the desired room.
3. Click on **Room Inventory Report**, located on the respective room's row under the **Actions** column. The report will launch as a PDF.
4. If you wish to print the report, click on the PDF reader's print icon, review the print window, and click OK.
5. Click on to close the **Room Inventory Report** window.

Room Inventory Worksheet

The **Room Inventory Worksheet** provides a listing of the items within each room and their respective details including Tag, Product Name, Model, Hardware Type, Serial, Price and any information in the Other field.

1. Click on Rooms, located on the top navigation bar.
2. Click on **Rooms Report Drop Down Menu**, located above the Rooms' blue grid header.
3. Select **Room Inventory Worksheet**, under the **--- PDF ---** menu subcategory.
4. The report will launch as a PDF. You may choose to print, save, and/or close the file using the PDF reader's controls.

Did You Know?

To verify each room's inventory, scan each item in a room rather than verify items via pen and paper by using the TIPWeb-IT **Audit** feature (located in the **Audits** tab, under each room's expanded row).

A room **Audit** allows a site to scan all tags in a room and quickly identify missing items, misplaced items, and where those misplaced items should be located.

NOTES

Barcode IDs

This report provides, in PDF format, a listing of the staff members on your site including: Staff ID, First Name, Middle Name, Last Name, and a respective barcode based on the staff member's ID number.

1. Click on Staff, located on the top navigation bar.
2. Click on **Staff Report Drop Down Menu**, located above the Staff's blue grid header.
3. Select **Barcode IDs** under the **--- PDF ---** menu subcategory.
4. The **Barcode IDs** report will open within a PDF reader. You may choose to print, save, and/or close the file using the PDF reader's controls.

Staff Listing

This report provides, in XLS format, a listing of the staff members on your site including: Staff ID, First Name, Middle Name, Last Name, Grade, Homeroom, and Staff Type.

1. Click on Staff, located on the top navigation bar.
2. Click on **Staff Report Drop Down Menu**, located above the Staff's blue grid header.
3. Select **Staff Listing** under the **--- Excel ---** menu subcategory.
4. When the message appears asking "Do you want to open or save Staff.xls ...", click on **Open**.
5. The **Staff Listing** report will open within **Microsoft Excel**. You may choose to search, filter, sort, delete, save, and/or close the file using Excel's controls.

Did You Know?

Any TIPWeb-IT barcode report can be printed on labels.

The barcode reports are formatted to print 80 barcodes per sheet of labels (3M Label #3100-Q or Avery Label #5167).

NOTES

Barcode IDs

This report provides, in PDF format, a listing of the students on your site including: Student ID, First Name, Middle Name, Last Name, and a respective barcode based on the student member's ID number.

1. Click on Students, located on the top navigation bar.
2. Click on **Students' Report Drop Down Menu**, located above the Students' blue grid header.
3. Select **Barcode IDs** under the **--- PDF ---** menu subcategory.
4. The **Barcode IDs** Report will open within a PDF reader. You may choose to print, save, and/or close the file using the PDF reader's controls.

Student Listing

This report provides, in XLS format, a listing of the students on your site including: Student ID, First Name, Middle Name, Last Name, Grade, and Homeroom.

1. Click on Students, located on the top navigation bar.
2. Click on **Students' Report Drop Down Menu**, located above the Students' blue grid header.
3. Select **Student Listing** under the **--- Excel ---** menu subcategory.
4. When the message appears asking "Do you want to open or save Students.xls ...", click on **Open**.
5. The **Students Listing** report will open within **Microsoft Excel**. You may choose to search, filter, sort, delete, save, and/or close the file using Excel's controls.

Did You Know?

If you filter the Student's grid before selecting a students report, the report will display only the filtered information.

NOTES

Activity

Problem Solving

In pairs or small groups, read the following scenarios and answer the questions.

1. In preparation for issuing out items to students, you have been asked to provide labels of student ID barcodes by grade level in alphabetical order by last name. How would you accomplish this task in TIPWeb-IT?

2. In preparation for classroom audits, within TIPWeb-IT how do you quickly find out how many classrooms your site contains?

3. What is the Avery label product number TIPWeb-IT uses to print barcode ID reports (rooms, staff, and students)?

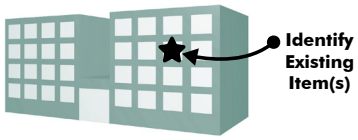
NOTES

Inventory Introduction

Before an item can be issued to an individual or show up on a room inventory report, it must first be issued a tag and a room location on your site.

There are three ways to issue items to rooms on your site. They are:

1. **Initialize** -



Example: a mounted ceiling projector which was purchased years ago

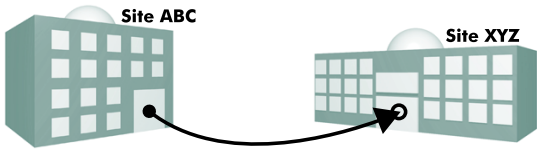
Initializing a room is the process by which you tell TIPWeb-IT where each currently owned item is located within your site. This process is most commonly used when entering items currently located in a room not yet tagged/tracked in TIPWeb-IT.

2. **Purchase Orders** -

Example: newly purchased computers for a computer lab

This process allows you to simultaneously record basic purchasing data (purchase order number, purchase date, vendor, funding source, and quantity), link tags to the newly acquired items, and issue them in the specified location (room) on the site.

3. **Site to Site Transfers** -

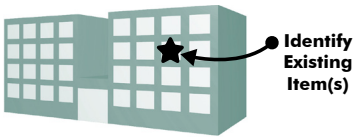


Example: site ABC taking ownership of laptop cart which was not being used on site XYZ

This allows tagged items in the status of "Available" to be moved from one site to another site. The site which currently stores the items will initiate the transfer. The site the items will be moved to will receive the transfer.

NOTES

Initialize an Item to a Room



The following steps require item **tags**.

1. Click on Rooms, located on the top navigation bar.
2. Using the **Rooms** filter, search for the desired room to which you wish to initialize products.
3. Click on **Initialize Room Inventory** located on the room's respective row.
4. Select the **Funding Source** for the item you are initializing.
5. Locate the product in the printed product catalog and scan the **Product Number** barcode into the **Product Number** field **OR** click on **Search** to find and select the desired product.
6. Select the **Status** of the item.

   Available - assigns item to the room for the purpose of later issuing it to an individual or another room.

   In Use - assigns item to the room with a status of "in use"' making it unavailable to issue to a staff member or a student.
7. Locate the item's **Tag** and scan it into the **Tag field**.
8. If a serial number is required, enter the serial number of this item into the **Serial** field.
9. Once successfully initialized, the item appears in the **Scan History for Today** grid.
10. Click **Done** to close the **Initialize Room Inventory** window.

Did You Know?

The **Product Catalog** is a complete listing of products within TIPWeb-IT. It has detailed information regarding each product, including a product number barcode from which to scan.

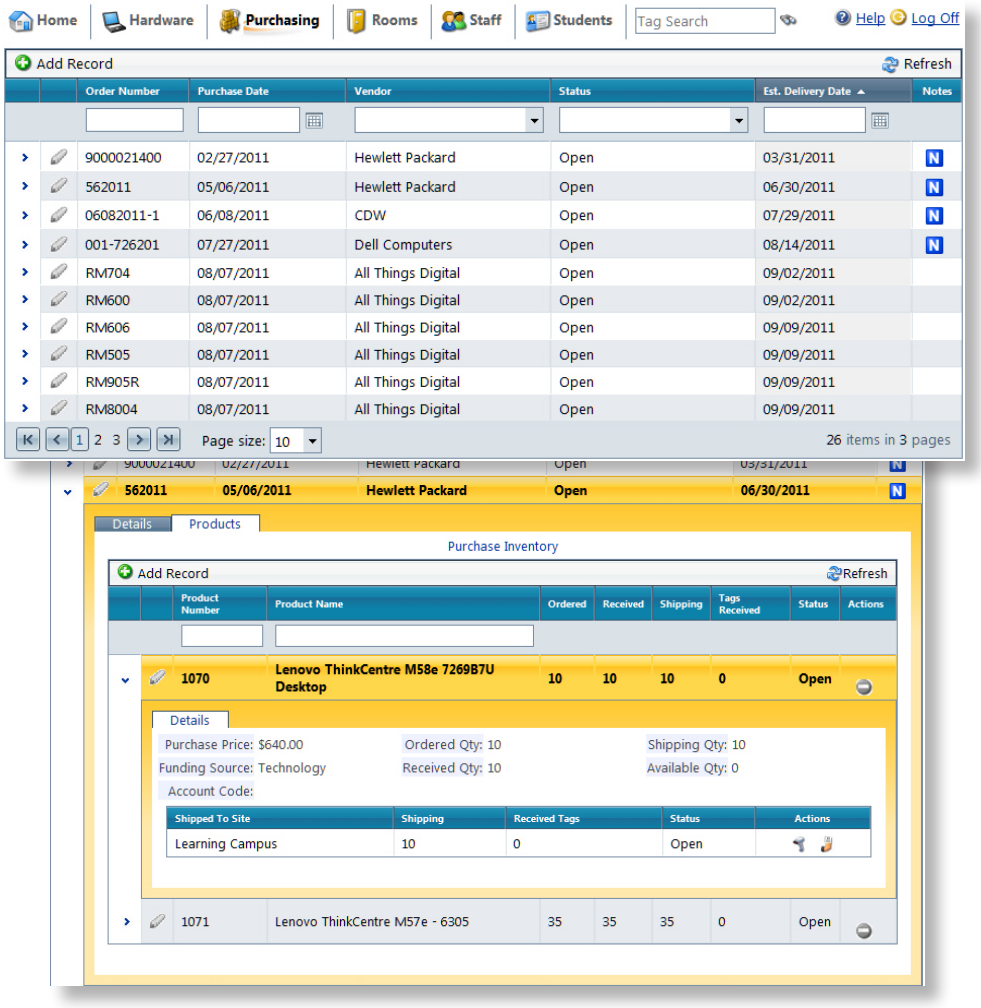
A print out of the **Product Catalog** will allow you to utilize a scanner during the initialization process in order to identify and quickly scan the product number.

Review a sample product catalog in the "In The Know" section of this training manual.

NOTES

Purchasing Overview

The **Purchasing** page allows a district user or site administrator to create purchase orders, receive, and assign items to rooms while simultaneously recording essential purchasing data (purchase order number, purchase date, vendor, funding source, and quantity).



A purchase order may contain multiple products. Site level administrators can create purchase orders and add products to purchase orders, in addition to the site users' ability to print pick tickets and scan items to rooms.

Did You Know?

District level administrators create purchase orders and may add items to any existing site created purchase order.

NOTES

Receive a Product from a Purchase Order

Receiving items to your site requires one or more products within a purchase order to be in the status of **In Transit**.

1. Click on Purchasing, located on the top navigation bar.
2. In the **Order Number** field, enter/scan the pick ticket barcode for the purchase order number.
3. Click on the respective purchase order's row.
4. On the **Products** tab, locate or scan the pick ticket barcode for the desired product to receive.
5. Click on the respective product's row.
6. Click on **Scan Tag into Inventory** on the respective **In Transit** shipment row. The **Receive By Tag** window opens.
7. Select the room, from the **Room** field's drop down menu, to which you wish to assign this product.
8. Select the status of the product from the **Status** drop down menu.

   Available - assigns this item to this room for the purpose of later issuing it to an individual or another room.

   In Use - assigns this item to this room and designates it is not available to issue to another room, staff, or student.
9. Locate the item's **Tag** and scan it into the **Tag** field.

Continued on next page

Did You Know?

By the time you are receiving an item into a room from a purchase order, there should be a bar coded unique tag on the item.

All tags printed through TIPWeb-IT have barcodes you can scan.

Scanning is highly preferable to hand entering the tag as it is a quicker and more accurate process.

HINT: Use the pick ticket bar codes to scan the purchase order number and the product number for each **In Transit** product.

NOTES

10. If extra data is required, enter/scan the data into the respective field(s).

11. If applicable, continue to scan all tags until the entire quantity of this product has been received (the **Room** and **Status** field will default to last user selected setting).

12. Once all items have been received, a success message will display to communicate receiving for this product is complete. Click **Done** to close the **Receive By Tag** window.

13. If applicable, continue to receive items for all respective **In Transit** shipments respective to this purchase order's selected product by following steps 6 through 12.

Correct an Accidental Tag Issuance from a Purchase Order

If you accidentally issue an item/tag incorrectly to a room from a purchase order, you have 24 hours within the **Receive By Tag** window to delete the mistake.

After 24 hours, you will need to perform a Room to Room transfer to the correct location.

For Example: You just issued tag W1234 to a Dell laptop in the status of Available to room 201 and you meant to issue it to room 301 in the status of In Use.

Use the **Delete** icon under the **Actions** column to delete this mistake and then receive it correctly without leaving the **Receive By Tag** window.

Did You Know?

A district created purchase order will remain in the status of **Open** until the district level administrator changes the purchase order status to **Closed**.

A site created purchase order will remain in the status of **Open** until all of the tags have been received to rooms or until the district level administrator changes the purchase order status to **Closed**.

Once **Closed**, a purchase order has to be reopened by a district administrator.

NOTES

Create a Purchase Order

Creating a TIPWeb-IT purchase order requires the vendor to exist in TIPWeb-IT.

1. Click on Purchasing, located on the top navigation bar.
2. Click on **Add Record**.
3. Enter the **Purchase Order** details. Red fields are required information. The default **Status** for a new purchase order is **Open**.
4. Click on **Save**.

Adding Products to a Purchase Order

Creating a TIPWeb-IT purchase order requires the vendor to exist in TIPWeb-IT.

1. Filter the **Purchasing** grid to locate the desired purchase order.
2. Click on the respective purchase order's row. The grid expands.
3. On the **Products** tab, click on **Add Record**.
4. Enter the **Product** details. Red fields are required information.
5. Click on **Save**.
6. To continue adding products to this purchase order, follow steps 3 through 5.

Did You Know?

These processes require site administrator level credentials.

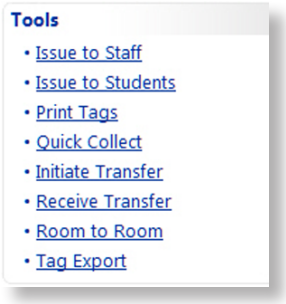
HINT: A printed **Product Catalog** will allow you to utilize a scanner while adding products to a purchase order by quickly identifying and scanning the product number.

NOTES

Initiate Transfer

TIPWeb-IT allows items to be moved from one site to another site through the process called **Site to Site Transfers**. Site to site transfers require the items to be in the status of **Available**. **Tag Search** or **Tag Export** will help you verify the item's current status.

1. Click on **Initiate Transfer** under Quick Links **Tools**.



2. Click on **New Transfer** next to the **Transfer #** field (the transfer number is auto-generated).
3. Using the **Destination** field's drop down menu, select the site receiving the item(s).
4. Scan or enter the **Tag Number** into the **Tag** field. If you manually enter the tag, click on **Transfer** to add the item to the transfer.
5. Continue entering tag numbers until all items have been added.
6. Click on **Print Ticket**.
7. Using the PDF reader's controls, print out the **Transfer Ticket**.
8. Click **Done** to exit the **Initiate Transfer window**.
9. Click on **Ship Items**, changing the transfer status to **In Transit**.
10. Click **Done** to exit the **Initiate Transfer** screen.

Did You Know?

Once the transfer has been placed in the status of **In Transit**, no additional items can be added to this site to site transfer.

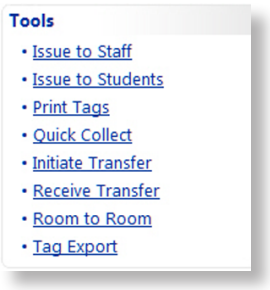
The **Transfer Ticket** remains with a status of **In Transit** until all items are received in full.

Once all items are received, the status changes to **Complete**.

NOTES

Receive Transfer

1. Click on **Receive Transfer** under **Tools** Quick Links.



2. Scan/enter the **Transfer Number** located on the **Transfer Ticket**. If you manually enter the ticket number, click on **Next** to proceed to the next field **OR** **Search** to find and select the appropriate **Transfer**.

3. Using the **Room** field's drop down menu, select the **Room** into which item will be received.

4. Using the **Status** field's drop down menu, select the **Status** of the item(s) being received.

   Available - assigns item to the room for the purpose of later issuing it to an individual or another room.

   In Use - assigns item to the room with a status of "in use", making it unavailable to issue to a staff member or a student.

5. Scan or enter the **Tag Number** into the **Tag** field. If you manually enter the number, click on **Receive** to issue this item to the selected room.

6. Continue to enter tag numbers until the **Complete** icon turns green for each product on the transfer. If desired, you may change the **Room** and **Status** fields before entering another tag. Unless changed, those fields will retain the original settings from step 3 and 4.

7. Click **Done** to exit the **Receive Transfer** screen.

Did You Know?

The **Transfer Ticket** contains all of the tag numbers in the respective site to site transfer.

These tickets can be used to help receive the transferred items into TIPWeb-IT.

If you wish to print another copy of the **Transfer Ticket**, select **Print Ticket** on the **Receive Transfer** screen.

NOTES

Activity

Problem Solving

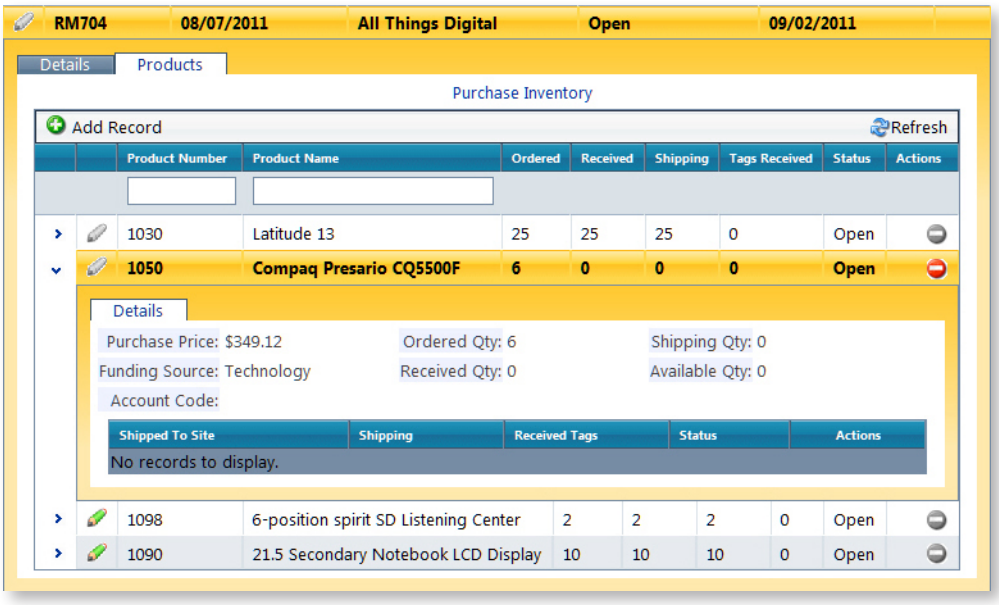
In pairs or small groups, read the following scenarios and answer the questions.

1. The PTA has purchased 10 Apple iPads for your campus' special education department. You have been asked to tag and place these items into Room 685 (status of "In Use").

   What steps would you take to accomplish this?

2. Six Compaq Presario CQ5500F were drop shipped to your site from a vendor. The district included this product in purchase order RM704.

   Using the purchase order details below, what needs to happen to receive these 6 items to Room 101 in the status of Available?



NOTES

Issuing & Collecting

The **Issuing** process in TIPWeb-IT requires the following:

1. **ID Number** - The student/staff ID number can be searched for and selected on the screen, hand entered, or scanned from an ID barcode. However, it must match the ID number currently in the system. If an ID number doesn't exist, read the "Nice to Know" section on how to add a staff member and/or student to TIPWeb-IT.

2. **Tag Number** - This must be a tag located on your site and in the status of "Available."

3. **Specific Item Information** - The district level administrator may require additional information to be recorded when certain products are issued. Such as: accessories, image date, serial number, etc...

The **Collecting** process in TIPWeb-IT requires the following:

1. **Tag Number** - This must be a tag located on your site and not in the status of "Available."

2. **Specific Item Information** - The district level administrator may require additional information to be recorded when certain products are collected. Such as: accessories

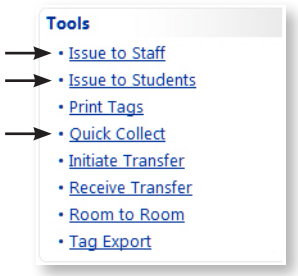
Did You Know?

When an item is received onto a site, a tag number is assigned and the item is placed in one of the site's rooms. It resides in that room in the status of "Available" or "In Use."

NOTES

Fastest Way to Issue/Collect

TIPWeb-IT allows you to quickly issue/collect on the fly with the following:

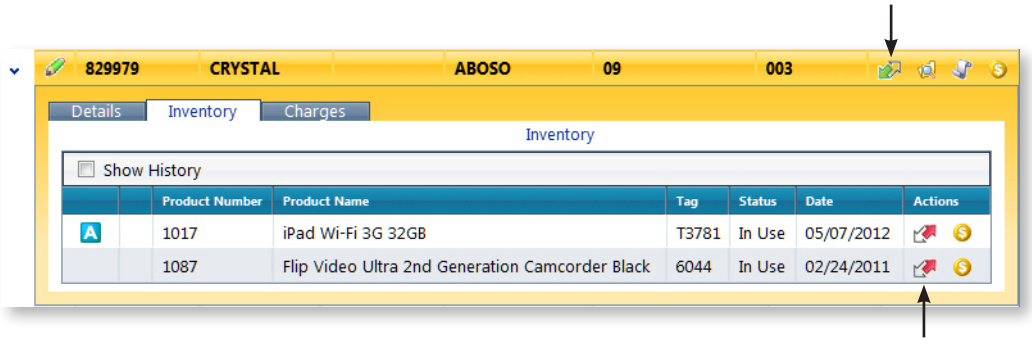


1. **Issue to Staff** - allows a site user to quickly issue an item to a staff member, in the status of "In Use"
2. **Issue to Students** - allows a site user to quickly issue an item to a student, in the status of "In Use"
3. **Quick Collect** - allows a site user to quickly collect items from student or staff members to a designated room, in the status of "Available"

Alternative Way to Issue/Collect

TIPWeb-IT allows you to also issue/collect while in the individual's account:

1. **Issue** - allows a site user to issue an item to the individual in the status of "In Use"
2. **Collect** - allows a site user to collect the item from the student or staff member, returning it to the original source in the status of "Available"

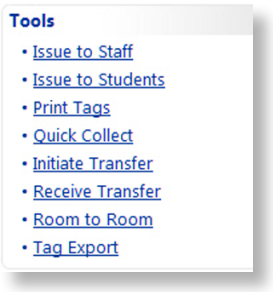


NOTES

Quick Issue to Staff

This process allows a site to quickly issue an item to staff members, in the status of "In Use."

1. Click on **Issue to Staff**, located in the Quick Links **Tools** menu. The **Issue Inventory** window will launch.



2. In the **Staff ID** field, enter or scan the staff member's ID number.

   If you don't have a staff ID barcode to scan or the staff ID available, click on **Search** to filter for and select the desired staff.

3. In the **Tag** field, enter or scan the tag number to be issued and click on **Save**.

4. To issue the tag and the required accessories, click on **Issue**. If district assigned accessories are issued with this tag, they can be viewed by mousing over the **Accessories** icon.

   Click on **Accessories** to edit the quantity issued of the respective accessory.

5. The **Current Inventory** for this staff member is displayed in the bottom grid. It will display all of the tags issued to this staff member.

6. If a **Transaction Receipt** is desired for this transaction, click on **View Transaction Receipt** to open the receipt as a PDF. Use the PDF reader's controls to print the receipt out.

7. Click **Done** to exit the **Issue Inventory** screen.

Did You Know?

If you don't have **Staff Member ID Barcodes** to scan, you can print them within TIPWeb-IT.

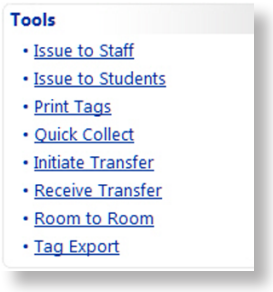
Look in the "Manage It" section for step-by-step instructions on how to print staff member ID barcodes.

NOTES

Quick Issue to Students

This process allows a site user to quickly issue an item to a student, in the status of "In Use."

1. Click on **Issue to Students**, located in the Quick Links **Tools** menu. → The **Issue Inventory** window will launch.



2. In the **Student ID** field, enter or scan the student's ID number.

   If you don't have a student ID barcode to scan or have the student ID available, click on **Search** to filter for and select the desired student.

3. In the **Tag** field, enter or scan the tag number to be issued and click on **Save**.

4. To issue the tag and the required accessories, click on **Issue**. If district assigned accessories are issued with this tag, they can be viewed by mousing over the **Accessories** icon.

   Click on **Accessories** to edit the quantity issued of the respective accessory.

5. The **Current Inventory** for this student is displayed in the bottom grid. It will display all of the tags issued to this student.

6. If a **Transaction Receipt** is desired for this transaction, click on **View Transaction Receipt** to open the receipt as a PDF. Use the PDF reader's controls to print the receipt. Click **Done** to close the receipt window.

7. Click **Done** to exit the **Issue Inventory** window.

Did You Know?

If you don't have **Student ID Barcodes** to scan, you can print them within TIPWeb-IT.

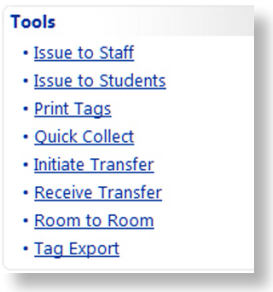
Look in the "Manage It" section for step-by-step instructions on how to print student ID barcodes.

NOTES

Quick Collect

This process allows you to quickly collect items from student and staff members to a designated room.

1. Click on **Quick Collect** under Quick Links **Tools**. The **Quick Collect** window will launch.



2. In the **Return to Room** field, enter the room number to which this tag will be collected and click on **Next**.

   If you can't remember the room number, click on the **Search** and select the desired room.

3. In the **Tag** field, enter or scan the tag number to be collected and click on **Save**.

4. If there are accessories which are required to be collected for this tag, they will be displayed. To collect the tag and the required accessories, click on **Collect Selected**.

5. The **Collection History** is displayed in the bottom grid. It will display all of the tags collected today.

6. If a **Transaction Receipt** is desired for this transaction, click on **View Transaction Receipt** to open the receipt as a PDF. Use the PDF reader's controls to print the receipt. Click **Done** to close the receipt window.

7. Click **Done** to exit the **Quick Collect** window.

NOTES

Issue from an Individual's Account

This process allows a site to issue an item to a staff member or student, in the status of "In Use."

1. Click on Staff or Students, located on the top navigation bar.

2. Using the grid filters, search for the desired staff member.

3. Click on **Issue Inventory**, located in the respective individual's row under the **Actions** column. The **Issue Inventory window** will launch.

4. In the **Tag** field, enter or scan the tag number to be issued and click on **Save**.

5. To issue the tag and the required accessories, click on **Issue**. If district assigned accessories are issued with this tag, they can be viewed by mousing over the **Accessories** icon.

   Click on the **Accessories** to edit the quantity issued of the respective accessory.

6. The **Current Inventory** for this individual is displayed in the bottom grid. It will display all of the tags issued to this person.

7. If a **Transaction Receipt** is desired for this transaction, click on **View Transaction Receipt** to open the receipt as a PDF. Use the PDF reader's controls to print the receipt out.

8. Click **Done** to exit the **Issue Inventory** screen.

Did You Know?

If multiple tags are to be issued to the same individual, select the **Lock** icon next to the **ID** field.

This allows you to scan all of the tag numbers without entering the same person's ID for each tag.

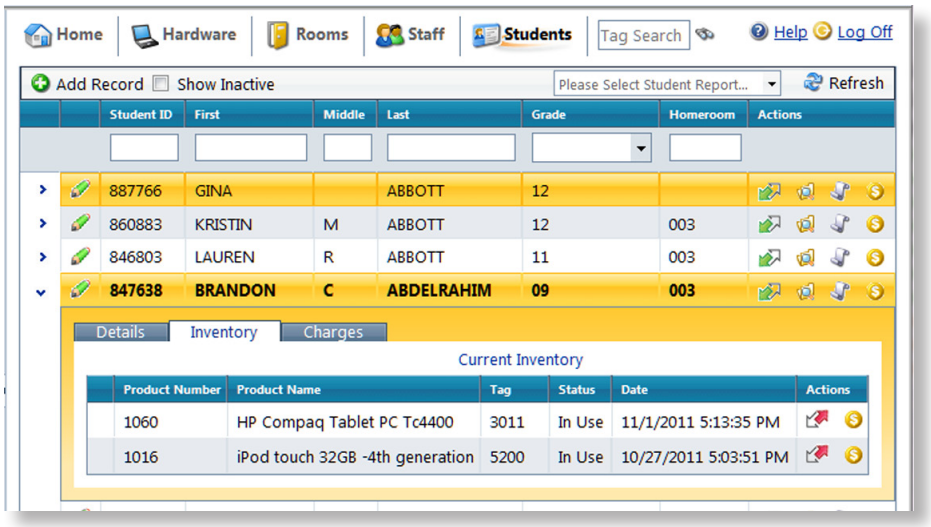
NOTES

Collect from an Individual's Account

This process allows a site user to collect an item with the status of "in use"directly from an individual's account.

1. Click on Staff or Students, located on the top navigation bar.

2. Filter for and/or click on the desired person's row. The row will turn yellow and the individual's details will open.



3. Within the **Inventory** tab, locate the item to be collected and click on **Return Inventory** under the **Actions** column.

4. A message will appear asking you "Are you sure you want to collect this item?"

   Click **OK** to return the item to its originating source (room) in the status of "Available."

   Click **Cancel** to keep the item issued to the student's account in the status of "In Use."

Did You Know?

To locate where the tag's originating source is after you have collected the item from the student, perform a **Tag Search** for that tag number.

To collect the item to a room of your choice, collect the item from the **Quick Collect** screen.

NOTES

View/Print a Transaction Receipt

A **Transaction Receipt** provides, in PDF format, a listing of all products and their respective tag numbers issued to a particular individual.

This report specifically provides Name, Address, Site, Date Printed, Product Name, Product Number, Tag Number, Status, Issued Date, Returned Date, Value, and Accessory Information (including quantity, name, value, and if it must be returned).

1. Click on Staff or Students, located on the top navigation bar.

2. Using the grid filters, search for the individual for whom you wish to print a receipt.

3. Click on **View Transaction Receipt**, located in the respective person's row under the **Actions** column. The report will launch as a PDF.

4. If you wish to print the report, click on the PDF reader's print icon, review the print window, and click **OK**.

5. Click on to close the **Transaction Receipt Report** window.

Did You Know?

The receipt has room at the top of the page to accommodate letterhead.

If the receipt is tri-folded in a Z fold, the staff member's name and address will be positioned correctly to be visible within a number 10 window envelope.

NOTES

Activity

Problem Solving

In pairs or small groups, read the following scenarios and answer the questions.

1. You need to print student transaction receipts for any student with an item issued to them. How do you print those receipts all at once?

2. How do you find out which staff members have items in the status of "In Use" issued to them and what those items are?

3. You have a large number of students waiting in a line to be issued items. How do you quickly issue those items in TIPWeb-IT?

NOTES

Assess a Charge

Assessing a charge with a tag allows the site user to document and/or receive a specified dollar amount regarding an item/tag issued to the student.

Examples of a charge assessed with a tag include: missing accessory, broken part, late charge, etc...

A charge can be assessed without a tag associated with the charge to allow the site user to document and/or receive a specified dollar amount prior to the issuance of an item to a student.

Examples of a charge assessed without a tag include: insurance, deposit, permission form, etc...

1. Click on Students, located on the top navigation bar.

2. Using the **Students** filters, search for the desired student.

3. Click on **Assess Charge**, located in the respective student's row under the **Actions** column. The **Charges** tab for the respective student will open.

4. Click on **Add Record**.

5. Select a **Charge Type** from the **Charge Type's** drop down menu.

   If the district does not require a tag to be associated with the selected charge type, skip to step 7.

Continued on next page

Did You Know?

Charge Types are created by the district level administrative user.

Depending on the settings established, a site user may or may not:

- change the price of a charge type*
- view percentages based on the product's replacement price

If the* **Charge Amount *price displayed is in black text, the charge amount can be changed.*

NOTES

6. Click on **Select** (under the **Actions** header) to associate an **In Use** item to the charge.

   If the item is no longer in the status of **In Use** for this student, click on the **Show History** option in the **Product and Tag** header section. This will display all items which were previously issued to this student at one time.

7. If needed and if allowed by the district, adjust the **Charge Amount** in the **Charge Amount** field.

8. Enter any desired notes regarding this charge into the **Charge Notes** field.

9. Click on **Save**. The **Charge** is added to the **Charge History** grid at the bottom of the **Assess a Charge** window.

10. Click on to close the **Assess a Charge** window.

Did You Know?

If a mistake is made, you have the option to **Void** a **Charge Payment** and/or the **Charge** itself.

Use the respective **Edit** icon to access the **Void** option.

TIPWeb-IT only allows a charge with no payments to be voided.

If you wish to void a charge which has payments attached, you must first void each payment prior to voiding the charge.

NOTES

Process a Charge Payment

1. Click on Students, located on the top navigation bar.
2. Using the **Students** filters, search for the desired student.
3. The desired student's record expands displaying all items issued.
4. On the **Charges** tab, locate the item to which the charge was assessed.
5. Click on **New Charge Payment**, located in the respective charge's row under the **Actions** column. The **New Payment** window will launch.
6. Enter a payment amount into the **Amount** field.
7. Enter any desired notes regarding this charge into the **Payment Notes** field.
8. Click on **Save**. The **Charge Payment** is added to the **Charge History** grid at the bottom of the **New Payment** window and the "Payment has been saved successfully" statement appears.
9. Click on to close the **New Payment** window.

Did You Know?

If the **Payment Amount** matches the **Charge Amount Due**, the charge will automatically be set to satisfied.

You can also satisfy a charge without receiving full payment.

NOTES

Student Charge Receipt

The **Student Charge Receipt** provides, in PDF format, the information regarding the product, the charge type assigned, the status of the charge, any charge notes, and payment history for a particular student.

1. Click on Students, located on the top navigation bar.
2. Using the **Students** filters, search for the desired student.
3. The desired student's record expands displaying all items issued.
4. On the **Charges** tab, locate the item to which the charge was assessed.
5. Click on **Charge Receipt Report**, located in the respective charge's row under the **Actions** column. The receipt will launch as a PDF. Use the PDF reader's controls to print the receipt.
6. Click on to close the **Charge Receipt Report** window.

Did You Know?

The **Charge Receipt** has room at the top of the page to accommodate letterhead.

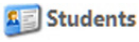
If the receipt is tri-folded in a Z fold, the staff member's name and address will be positioned correctly to be visible within a number 10 window envelope.

NOTES

Charge Listing

The **Charge Listing** report is available in XLS format. This report provides a listing of the students and their respective charges (satisfied or unsatisfied).

It includes Student ID, First Name, Middle Name, Last Name, Grade, Homeroom, Product, Tag, Charge Type, Charge Description, Charge Notes, Issue Date, Charge Amount, Amount Paid, Amount Due, and Satisfied Date.

1. Click on 

, located on the top navigation bar.

2. Click on **Students' Report Drop Down Menu**, located above the Students' blue grid header.

3. Select **Charge Listing** under the **--- Excel ---** menu subcategory.

4. When the message appears asking "Do you want to open or save StudentChargeListing.xls ...", click on **Open**.

5. The **Charge Listing** report will open within **Microsoft Excel**. You may choose to search, filter, sort, delete, save, and/or close the file using Excel's controls.

Did You Know?

The **Charge Listing** report provides a list of all charges assessed to students.

The report combines all respective payments for a charge into one **Amount Paid** field.

If you wish to see the individual payments applied to the charge, you will need to print a **Student Charge Receipt** or the **Charge Activity Listing Report**.

NOTES

Charge Activity Listing

The **Charge Listing** report is available in XLS format. This report provides a listing of the students, their respective charges (satisfied or unsatisfied), and any charge payments (valid or voided) within a site.

It includes Student ID, First Name, Middle Name, Last Name, Grade, Homeroom, Product, Tag, Charge Type, Charge Description, Charge Notes, Issue Date, Charge Amount, Activity Date, Activity Type, Activity Amount, Activity Notes, Activity Recorded By, and Satisfied Date.

1. Click on Students, located on the top navigation bar.

2. Click on **Students' Report Drop Down Menu**, located above the Students' blue grid header.

3. Select **Charge Activity Listing** under the **--- Excel ---** menu subcategory.

4. When the message appears asking "Do you want to open or save StudentChargeActivityListing.xls ...", click on **Open**.

5. The **Charge Activity Listing** report will open within **Microsoft Excel**. You may choose to search, filter, sort, delete, save, and/or close the file using Excel's controls.

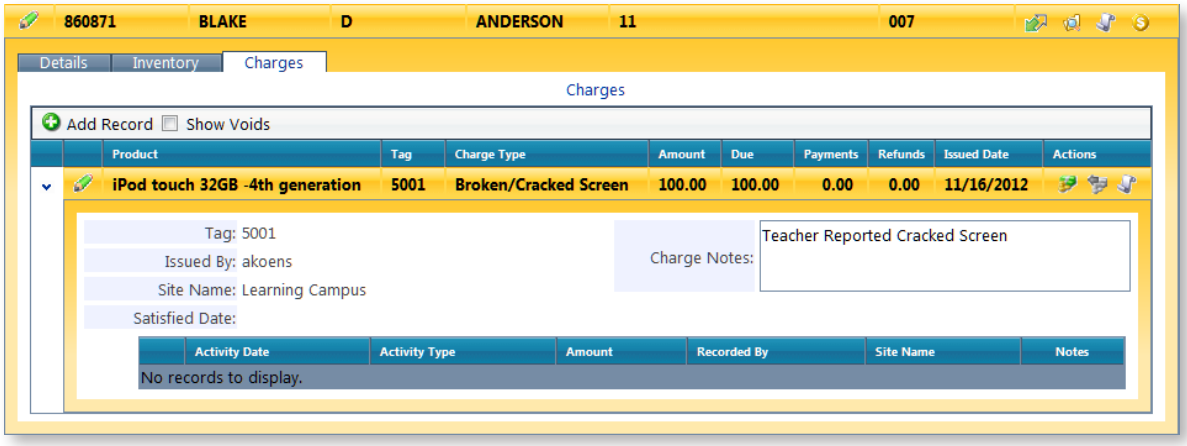
NOTES

Problem Solving

In pairs or small groups, read the following scenarios and answer the questions.

A student, who qualifies for the free and reduced lunch program, accidentally cracked their item's screen. The school principal has approved a discounted damage fee of $20 from the student.

Review the charges tab for this student below:



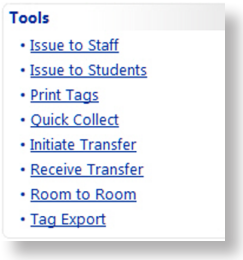
1. How do you receive the student's discounted payment of $20.00 and indicate the student will not be held responsible for the remainder of the charge amount.

2. While processing the $20.00 payment, you accidentally forgot to enter the details of the approved discount in the payment notes. How to do you fix this issue?

NOTES

Room to Room Transfer

1. Click on **Room to Room** under Quick Links **Tools**.



2. Enter the **Room Number** to which the item will be moved. If you manually enter the number, click on **Next** to proceed to the next field **OR** click on **Search** to find and select the **Room Number**.

3. Using the **Status** field's drop down menu, select the **Status** of the item being moved.

   Available - assigns item to the room for the purpose of later issuing it to an individual or another room.

   In Use - assigns item to the room with a status of 'in use', making it unavailable to issue to a staff member or a student.

4. Scan/enter the **Tag Number** into the **Tag field**. If you manually enter the number, click on **Save** to add this item to the room.

5. If accessories were issued to this tag, they will be displayed to remind you to transfer them with the item being moved from its current room. Select **Transfer Selected** to transfer the listed accessories.

6. Select **Done** to exit the **Room to Room Transfer** window.

Did You Know?

Unless changed, the **Status** field will retain the original settings from step 3.

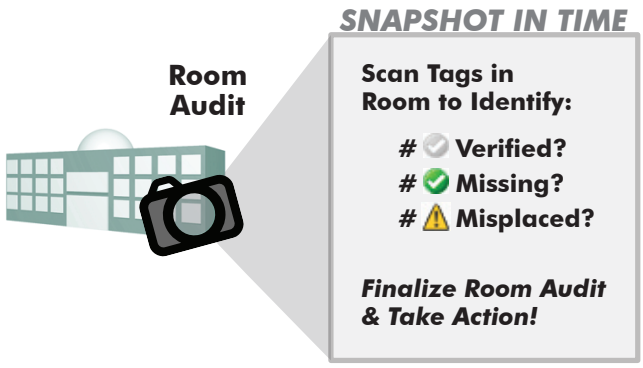
If multiple tags are to be moved to the same room, select the **Lock** icon.

This allows you to scan all of the tag numbers without entering the room number for each tag.

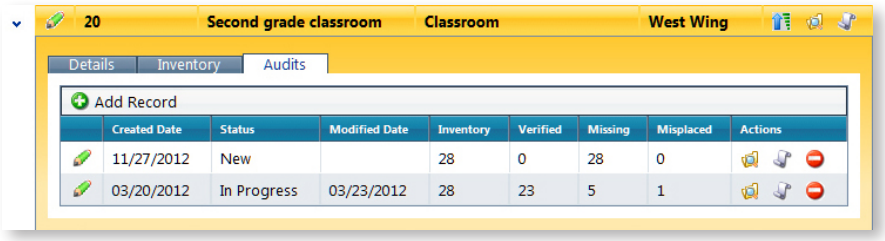
NOTES

Room Audit Introduction

An **Audit** allows a site to scan all tags in a room and quickly identify missing items, misplaced items, and where those misplaced items should be located.

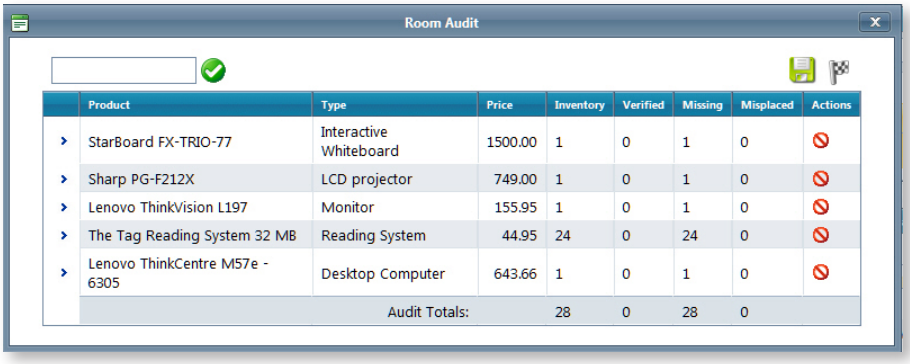


Audits are located within the respective room being audited.



Created Date	Status	Modified Date	Inventory	Verified	Missing	Misplaced	Actions
11/27/2012	New		28	0	28	0	
03/20/2012	In Progress	03/23/2012	28	23	5	1	

The **Room Audit** window allows a site user to quickly scan each tag in the room.



Product	Type	Price	Inventory	Verified	Missing	Misplaced	Actions
StarBoard FX-TRIO-77	Interactive Whiteboard	1500.00	1	0	1	0	
Sharp PG-F212X	LCD projector	749.00	1	0	1	0	
Lenovo ThinkVision L197	Monitor	155.95	1	0	1	0	
The Tag Reading System 32 MB	Reading System	44.95	24	0	24	0	
Lenovo ThinkCentre M57e - 6305	Desktop Computer	643.66	1	0	1	0	
	Audit Totals:		28	0	28	0	

Did You Know?

The TIPWeb-IT audit process enables sites to identify, track, and update where the items they are responsible for are located at that specific moment in time.

This process satisfies the district's annual requirement of accounting for all site items and enables the site to perform spot audits at will.

NOTES

Audit a Room

An **Audit** allows a site to scan all tags in a room and quickly identify the items missing, what is not supposed to be there, and where it should be located.

1. Click on Rooms, located on the top navigation bar.
2. Filter the **Rooms** grid to locate the desired room.
3. Click on the desired room's row. The grid expands displaying all tabs.
4. Click on the **Audits** tab.
5. Click on **Add Record** located on the **Audits** tab. The **Room Audit** window opens.
6. Review the products listed on the Room Audit grid. If any product should be excluded from this room audit, click on **Exclude** under the **Actions** header on the respective product's row.
7. Scan/enter each tag number located in the respective room into the **Enter Tag** field.

   Enter all tags physically located in the respective room. Do this even if the product is not listed on the **Room Audit** window as an issued product for that room. TIPWeb-IT identifies each tag as **Missing**, **Misplaced**, or **Verified** and allows the site to take action tag by tag.
8. If needed, click **Save** to leave the **Room Audit** window prior to finalizing the audit.
9. Click **Finalize** to the end and lock the audit from additional tag entries. This changes the audit status from **In Progress** to **Finalized**.

Did You Know?

If an unintentional tag is entered/scanned in an audit, there is a limited time in which to undo this entry.

Expand the grid for the respective product and locate the tag.

Under the **Actions** header, click on **Undo** to remove the tag from the audit.

If the icon is grayed out, it is no longer available to be undone.

NOTES

Take Action on a Finalized Audit

Once an **Audit** is in the status of **Finalized**, the site can quickly take action on each tag in the state of **Missing** or **Misplaced** or take no action at all. If a tag is **Missing**, the site can change the status of the tag. If a tag is **Misplaced**, the tag can be collected to the room. Once all tags have had an action taken regarding their respective audit state, the audit can be closed.

1. On the **Audits** tab, click on **Audit Details** located under the **Actions** header on the respective row of the finalized audit. This opens the **Room Audit Details** window.

2. Use the search fields to identify which tag to take action on or start at the top of the grid to take action on each **Missing** or **Misplaced** tag.

3. Click on the Select Action... **Select Action** drop down menu on the respective tag's row. After an action has been taken, the respective tag will be sorted to the bottom of the **Room Audit Details** grid.

   Missing Tags - Choose **No Action** and supply notes why no action is being taken, or choose to change the tag's status to **Lost**.

   Misplaced Tags - Choose **No Action** and supply notes why no action is being taken, or choose to **Collect** the tag to the current room (the tag will be in the status of **Available**).

4. After taking action on desired items, click on **Wrap Up Audit** to set all remaining tags to **No Action** and supply notes why no action is being taken for the remaining tags.

   This also changes the audit status from **Finalized** to **Closed**.

5. Click on to close the **Room Audit Details** window.

Did You Know?

The tags in the **Room Audit Details** window are sorted by **Audit State**.

The order by which the grid is sorted is first by **Missing**, then **Misplaced**, and finally **Verified**.

NOTES

Room Audit Summary Report

The **Room Audit Summary Report** provides a listing of the tags and their respective audit state for a specific room audit.

The report includes Room Number, Room Name, Room Type, Date Printed, Audit Status, Last Modified Date, Last Modified By, Created By, Created Date, Finalized By, Finalized Date, Audit Inventory count, Verified count, Missing count, Misplaced count, Audit Tag State, Product Name, Tag, Expected Location, Audit Location, and Action Taken (sorted by audit tag state).

1. Click on Rooms, located on the top navigation bar.
2. Filter the **Rooms** grid to locate the desired room.
3. Click on the desired room's row. The grid expands displaying all tabs.
4. Click on the **Audits** tab
5. Click on **Room Audit Summary Report**, located on the respective audit's row under the **Actions** column. The report will launch as a PDF.
6. If you wish to print the report, click on the PDF reader's print icon, review the print window, and click OK.
7. Click on to close the **Room Audit Summary Report** window.

NOTES

Problem Solving

In pairs or small groups, read the following scenarios and answer the questions.

A room audit has been performed for Room 270. Review the Room Audit Summary Report below:

Room #: 270
Room Name: Chemistry Lab
Room Type Lab

Room Audit Summary Report
Learning Campus
Monday, November 19, 2012

Status:	In Progress	Created By:	Debbie Disler	Audit Inventory: 33
Last Modified By:	Alison Koen	Created Date:	03/09/2012	Verified: 28
Last Modified Date:	11/19/2012	Finalized By:		Missing: 5
		Finalized Date:		Misplaced: 3

State	Product	Tag	Expected Location	Audit Location	Action Taken
Missing	TI CBL2	6359	Room: 270	None	
Missing	TI CBL2	6360	Room: 270	None	
Missing	TI CBL2	6361	Room: 270	None	
Missing	TI CBL2	6362	Room: 270	None	
Missing	TI CBL2	6363	Room: 270	None	
Misplaced	iPod touch 32GB -4th generation	5000	Room: 22	Room: 270	
Misplaced	iPod touch 32GB -4th generation	5001	Room: 22	Room: 270	
Misplaced	iPod touch 32GB -4th generation	5003	Room: 22	Room: 270	
Verified	TI CBL2	6335	Room: 270	Room: 270	Verified
Verified	TI CBL2	6336	Room: 270	Room: 270	Verified

1. This room has been searched high and low for missing items. They cannot be found. What is the next step for this room audit?

2. There are 3 misplaced items in this room audit. After it has been finalized, there are multiple ways to handle these misplaced items. Can you name 3 different ways and what would they entail?

NOTES

NOTES

Apply Grid Filter(s)

TIPWeb-IT allows a user to Filter data on many pages/areas. Most TIPWeb-IT grids have filters below the grid headers. You may type in and/or select from available drop down menus to activate a search using the filter(s) provided.

The following example uses the Hardware grid.

1. Review the grid headers and decide how you would like to filter for the desired data.

   In the following, we are searching for a 230 watt Sharp LCD projector.

Product Number	Product Name	Manufacturer	Model	Hardware Type	Other #1	Price
1005	10-unit Notebook Storage Cart	Anthro	NCC10	Cart		1699.00
1035	1510X Long Throw Projector	Dell Computers	1510X	LCD projector		890.14
1000	17 inch V173-DJb LCD Monitor	Acer	V173-DJb	Monitor	17"	134.95
1054	19 LE1909wm Wide LCD Monitor	Hewlett-Packard	LE1909wm	Monitor	19"	174.97
1004	20-Unit Laptop Storage Cart	Anthro	LTSC00WH/SM	Cart		1899.00
1090	21.5 Secondary Notebook LCD Display	Samsung		Monitor	21.5"	249.95
1006	22 inch E2237FWH Widescreen LCD Monitor	AOC	E2237FWH	Monitor	22"	232.95
1003	30-Unit Laptop Storage Cart	Anthro	LTSC30WH/SM	Cart		1999.00
1022	300AF plus	AverMedia	300AF	Document Camera		699.00
1098	6-position spirit SD Listening Center	Spirit		Listening Center		269.95

1 2 3 4 5 6 7 8 9 10 ... Page size: 10 119 items in 12 pages

2. Under the header you wish to filter by, enter the respective data and select the enter key on your keyboard.

Continued on next page

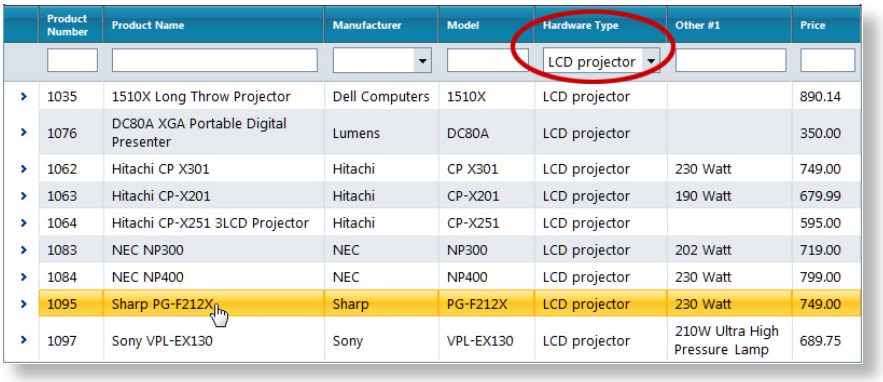
Did You Know?

Filtering is the process by which a user separates desired data from the entire data presented on the respective page/ area by using a filter or multiple filters.

This process does not remove data from the application. It merely makes the desired data easier to find/view.

NOTES

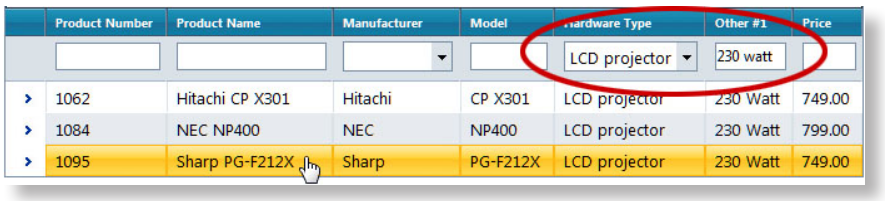
In the following, we filtered by Hardware Type of "LCD projector" and narrowed the information to nine possible LCD projectors. We can easily see the Sharp model and click on the respective row to review the product.



Product Number	Product Name	Manufacturer	Model	Hardware Type	Other #1	Price
				LCD projector		
1035	1510X Long Throw Projector	Dell Computers	1510X	LCD projector		890.14
1076	DC80A XGA Portable Digital Presenter	Lumens	DC80A	LCD projector		350.00
1062	Hitachi CP X301	Hitachi	CP X301	LCD projector	230 Watt	749.00
1063	Hitachi CP-X201	Hitachi	CP-X201	LCD projector	190 Watt	679.99
1064	Hitachi CP-X251 3LCD Projector	Hitachi	CP-X251	LCD projector		595.00
1083	NEC NP300	NEC	NP300	LCD projector	202 Watt	719.00
1084	NEC NP400	NEC	NP400	LCD projector	230 Watt	799.00
1095	Sharp PG-F212X	Sharp	PG-F212X	LCD projector	230 Watt	749.00
1097	Sony VPL-EX130	Sony	VPL-EX130	LCD projector	210W Ultra High Pressure Lamp	689.75

3. Continue to populate multiple filters to find the respective data.

In the following, we filtered by Hardware Type of "LCD projector" and Other #1 of "230 watt" and narrowed the information to three possible projectors. We can easily see the Sharp model and click on the respective row to review the product.



Product Number	Product Name	Manufacturer	Model	Hardware Type	Other #1	Price
				LCD projector	230 watt	
1062	Hitachi CP X301	Hitachi	CP X301	LCD projector	230 Watt	749.00
1084	NEC NP400	NEC	NP400	LCD projector	230 Watt	799.00
1095	Sharp PG-F212X	Sharp	PG-F212X	LCD projector	230 Watt	749.00

NOTES

Unlock a Field

The locking of data within TIPWeb-IT data fields prevents information from changing.

1. Locate the field you wish to change.

2. Click on **Locked**, located next to the field. This will unlock the field and the icon will change to **Unlocked**.

3. Enter the new data into the field. The field will become locked again.

NOTES

Edit a Tag

A user must be logged into the site on which the tag is located to be able to edit the tag's information.

1. Click within the **Tag Search** field, located on the top navigation bar.

2. Enter the tag number for which to search (it can be made up of alpha and/or numeric characters).
3. Click on **Search** or select the **Enter** key on your keyboard.
4. The **Tag Information** window will appear and display the details of the tag.
5. Click on **Edit.**
6. Edit the Tag Number field, Serial Number, Tag Notes, and any additional custom fields (required fields are red).
7. To cancel, click on **Cancel Changes**.
8. To save the changes, click on **Update**.
9. Click on to close the **Tag Information** window.

Did You Know?

Within the **Tag Information** window, you may have an icon to the right of the **Location** field.

This icon is clickable and will take you to the respective location displayed (Staff, Students, or Rooms).

This icon will only appear if the tag you searched for is located on your site.

The **Product** field, under **Product Information**, also has a clickable icon to the right of it and it will take you to the **Hardware** page for this respective product.

This icon is always available.

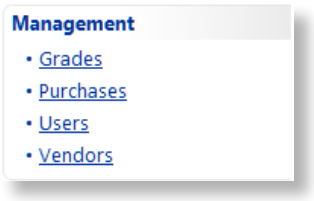
NOTES

HOW TO ADD MANUALLY

Add a Grade Level

Grades refer to the grade level assigned to staff members and/or students.

1. Click on Students or Staff, located on the top navigation bar.
2. Click on **Grades** under **Management** Quick Links.



3. Click on **Add Record**.
4. Enter the grade's details. Red fields are required information
5. Click on **Add** to Save
6. Click on to close the **Manage Grades** window.

Assign Grade Level to Staff/Student

1. Click on Students or Staff, located on the top navigation bar.
2. Search for the desired person.
3. Click on **Edit** located on the person's respective row.
4. In the **Grade** field, click on the drop down menu and select the desired grade level.
5. Click on **Update** to Save changes.

Did You Know?

TIPWeb-IT automatically updates student and staff demographic information, including grade level, through a data import process from your Student Management System.

If grade level data is not included in the import process, you can manually assign it to the student/staff member.

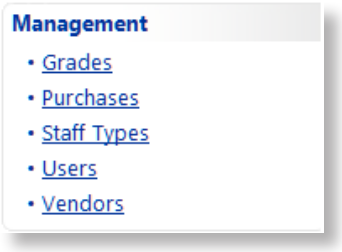
If the grade level you wish to assign to a student and/or a staff member is not available, you can add it to the grade level list in TIPWeb-IT.

NOTES

Add a Staff Type

Staff Types are general categories used to label different kinds of staff members within a site. Examples of Staff Types might include: Teacher, Technical Staff, Administrative Personnel, etc...

1. Click on Staff, located on the top navigation bar.
2. Click on **Staff Types** under Management Quick Links.



3. Click on **Add Record**.
4. Enter the details for the new staff type. Red fields are required information.
5. Click on **Add** to Save.
6. Click on to close the **Manage Staff Types** window.

NOTES

HOW TO ADD MANUALLY

Add a Staff Member

When adding a staff member manually, best practice is to use the ID number produced by your student management system. This will allow the nightly data import to update the record you added and will not create a second account for the same staff member.

Entering optional fields, such as **Staff Type** and **Grade**, will allow you to search for and filter reports by those fields for staff members.

1. Click on Staff, located on the top navigation bar.
2. Click on **Add Record**.
3. Enter the staff member's details. Red fields are required information (Staff ID, First Name, and Last Name).
4. Click on **Add** to Save.

Did You Know?

Staff members are automatically imported/updated on a nightly basis from your district's student management system.

This significantly reduces the amount of data you would otherwise be required to manually add.

You can add new staff manually when necessary — you just do not have to do that very often.

NOTES

HOW TO ADD MANUALLY

Add a Student

Students are the learners within a site to which an item is issued.

TIPWeb-IT updates your students automatically through a data import process where the data is exported from your student management system. This significantly reduces the amount of data you would otherwise be required to manually add to this database.

1. Click on Students, located on the top navigation bar.
2. Click on **Add** Record.
3. Enter the student's details. Red fields are required information (Student ID, First Name, and Last Name).
4. Click on **Add** to Save.

Did You Know?

Manually adding students is possible. Best practice is to use the ID number produced by your student management system when manually adding.

This will allow the data import to update the record you added and will not create a second account for the same student.

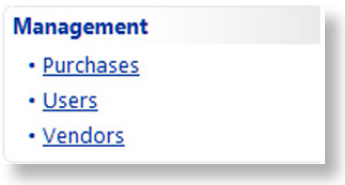
Entering optional fields, such as Homeroom and Grade, will allow you to search for and filter reports by those fields for students.

NOTES

Add a Vendor

A **Vendor** is an individual or a company who provides/supplies products to your district (similar to a supplier).

1. Click on **Vendors** under Quick Links **Management**.



2. Click on **Add Record**.

3. Enter the new vendor's details. Red fields are required information.

4. Click on **Add** to Save.

5. Click on to close the **Manage Vendors** window.

NOTES

NOTES

Product Catalog

TIPWeb IT

PRODUCT CATALOG

Hardware Type: Desktop Computer

Mac mini — Product No.: 1007

1007

Manufacturer: Apple
Model: MC270LL/A
Hardware Type: Desktop Computer
Department:
Price: $649.00
Other 1:
Other 2:
Other 3:

SKU:
Projected Life: 4
Notes: (2.4GHz Core 2 Duo/2GB/320GB/SD/AP/BT)

iMac — Product No.: 1008

1008

Manufacturer: Apple
Model: MC508LL/A
Hardware Type: Desktop Computer
Department:
Price: $1,149.00
Other 1:
Other 2:
Other 3:

SKU:
Projected Life: 4
Notes: (21.5" LED/3.06GHz Intel Corei3/2x2GB/500GB/4670/SuperDrive/WLMKB)

Mac Pro 8-Core — Product No.: 1009

1009

Manufacturer: Apple
Model: MC561LL/A
Hardware Type: Desktop Computer
Department:
Price: $3,199.00
Other 1:
Other 2:
Other 3:

SKU:
Projected Life: 3
Notes: (Two 2.4GHz Quad-Core Intel Xeon"Westmere" processors/6GB 1066MHz DDR3 ECC SDRAM (6x1GB)/ATI Radeon HD 5770 1GB/1TB 7200-rpm Serial ATA 3Gb/s/18x SuperDrive/Bluetooth 2.1+EDR)

Compaq EVO 51S Desktop Computer — Product No.: 1029

1029

Manufacturer: Compaq
Model: Compaq EVO
Hardware Type: Desktop Computer
Department:
Price: $670.00
Other 1:
Other 2:
Other 3:

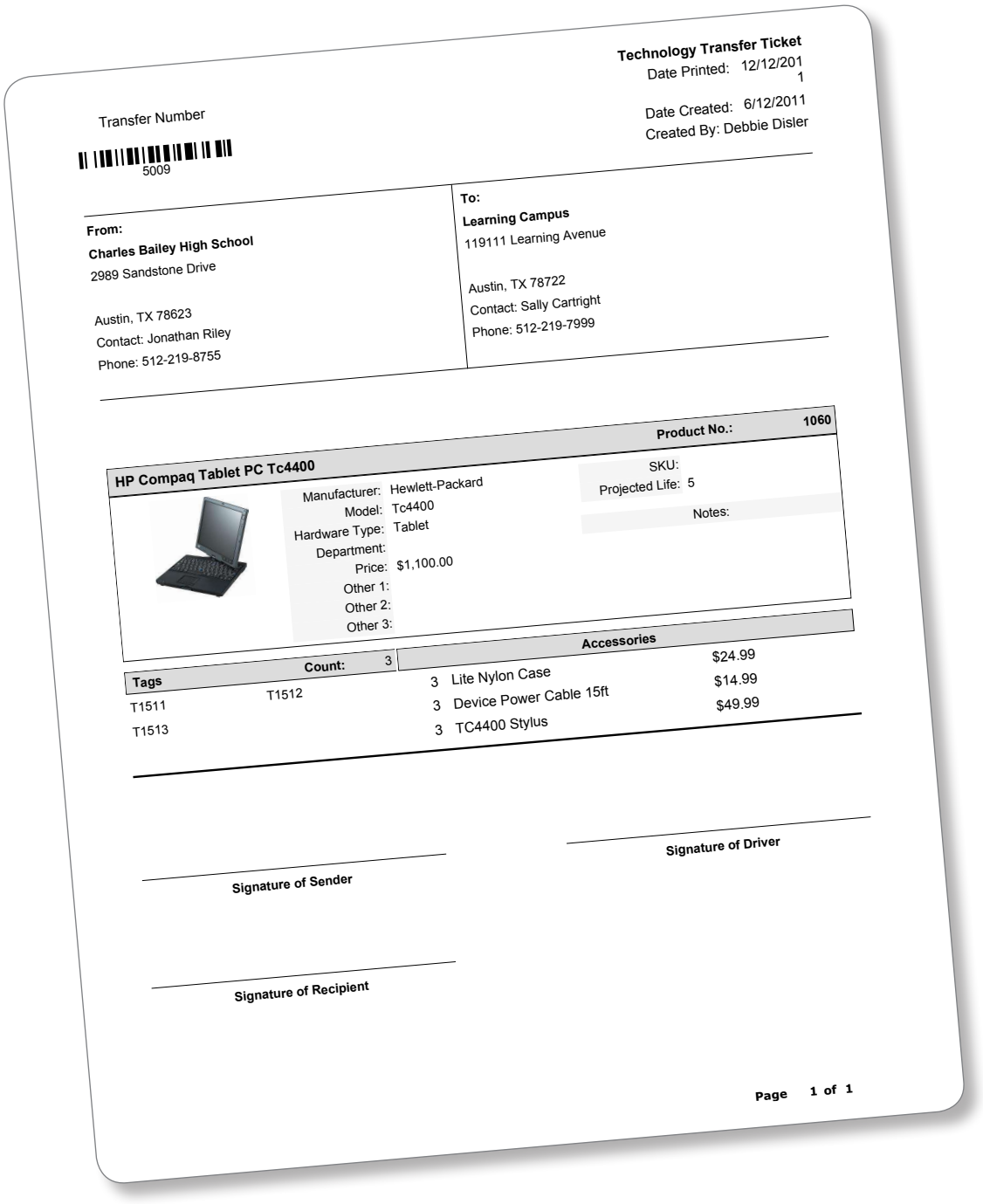
SKU:
Projected Life: 4
Notes:

Date Printed: 12/19/2011

Page 1 of 4

NOTES

Site to Site Transfer Ticket



Technology Transfer Ticket
Date Printed: 12/12/2011

Transfer Number
5009

Date Created: 6/12/2011
Created By: Debbie Disler

From:
Charles Bailey High School
2989 Sandstone Drive

Austin, TX 78623
Contact: Jonathan Riley
Phone: 512-219-8755

To:
Learning Campus
119111 Learning Avenue

Austin, TX 78722
Contact: Sally Cartright
Phone: 512-219-7999

HP Compaq Tablet PC Tc4400 — **Product No.:** 1060

Manufacturer: Hewlett-Packard
Model: Tc4400
Hardware Type: Tablet
Department:
Price: $1,100.00
Other 1:
Other 2:
Other 3:

SKU:
Projected Life: 5
Notes:

Tags	Count: 3	Accessories	
T1511	T1512	3 Lite Nylon Case	$24.99
T1513		3 Device Power Cable 15ft	$14.99
		3 TC4400 Stylus	$49.99

Signature of Sender

Signature of Driver

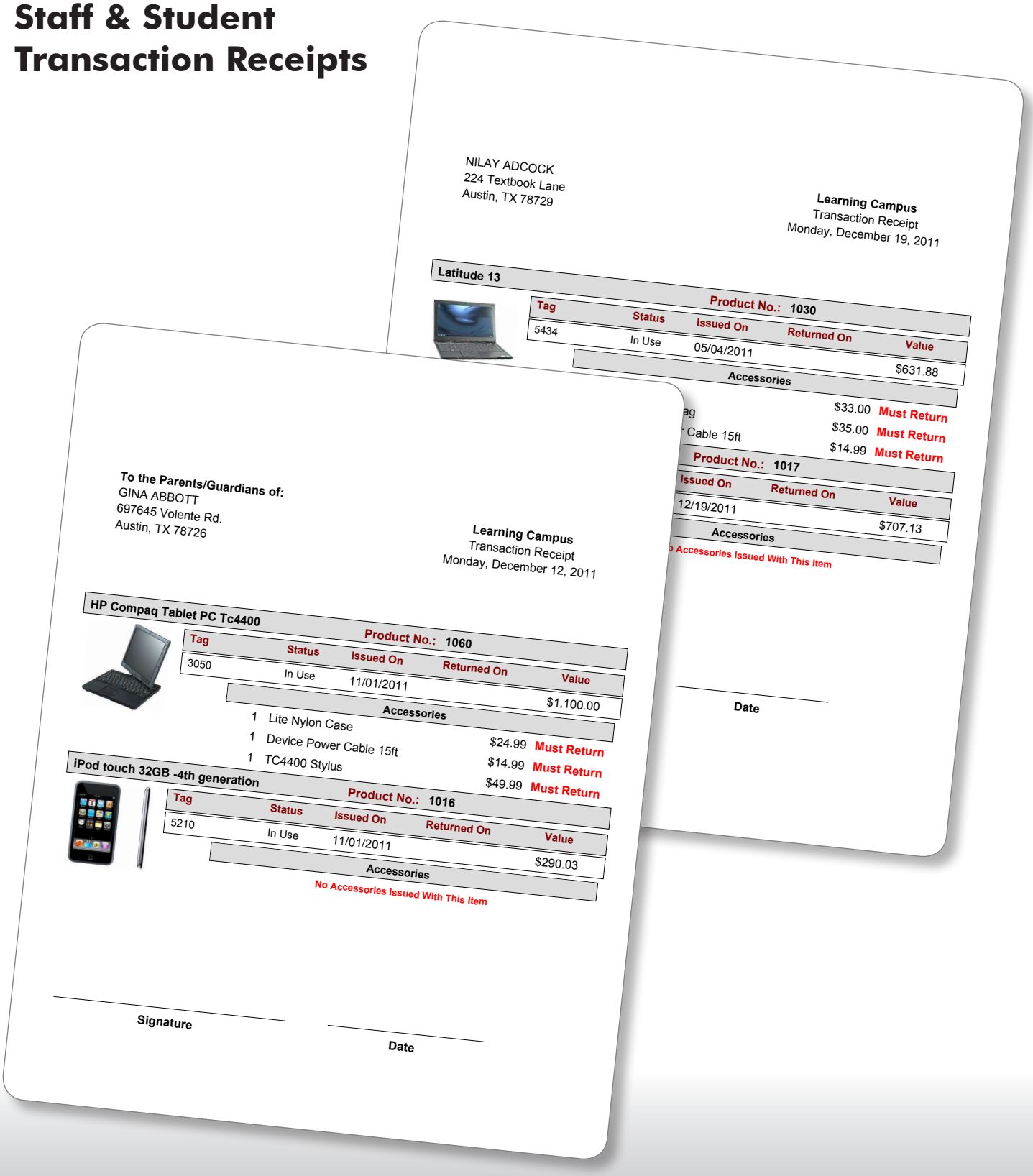
Signature of Recipient

Page 1 of 1

NOTES

REPORT SAMPLES

Staff & Student Transaction Receipts



NILAY ADCOCK
224 Textbook Lane
Austin, TX 78729

Learning Campus
Transaction Receipt
Monday, December 19, 2011

Latitude 13

Tag	Status	Issued On	Returned On	Value
5434	In Use	05/04/2011		$631.88

Product No.: 1030

Accessories

ag $33.00 Must Return
Cable 15ft $35.00 Must Return
$14.99 Must Return

Product No.: 1017

Issued On	Returned On	Value
12/19/2011		$707.13

Accessories

o Accessories Issued With This Item

Date

To the Parents/Guardians of:
GINA ABBOTT
697645 Volente Rd.
Austin, TX 78726

Learning Campus
Transaction Receipt
Monday, December 12, 2011

HP Compaq Tablet PC Tc4400

Product No.: 1060

Tag	Status	Issued On	Returned On	Value
3050	In Use	11/01/2011		$1,100.00

Accessories

1	Lite Nylon Case	$24.99	Must Return
1	Device Power Cable 15ft	$14.99	Must Return
1	TC4400 Stylus	$49.99	Must Return

iPod touch 32GB -4th generation

Product No.: 1016

Tag	Status	Issued On	Returned On	Value
5210	In Use	11/01/2011		$290.03

Accessories

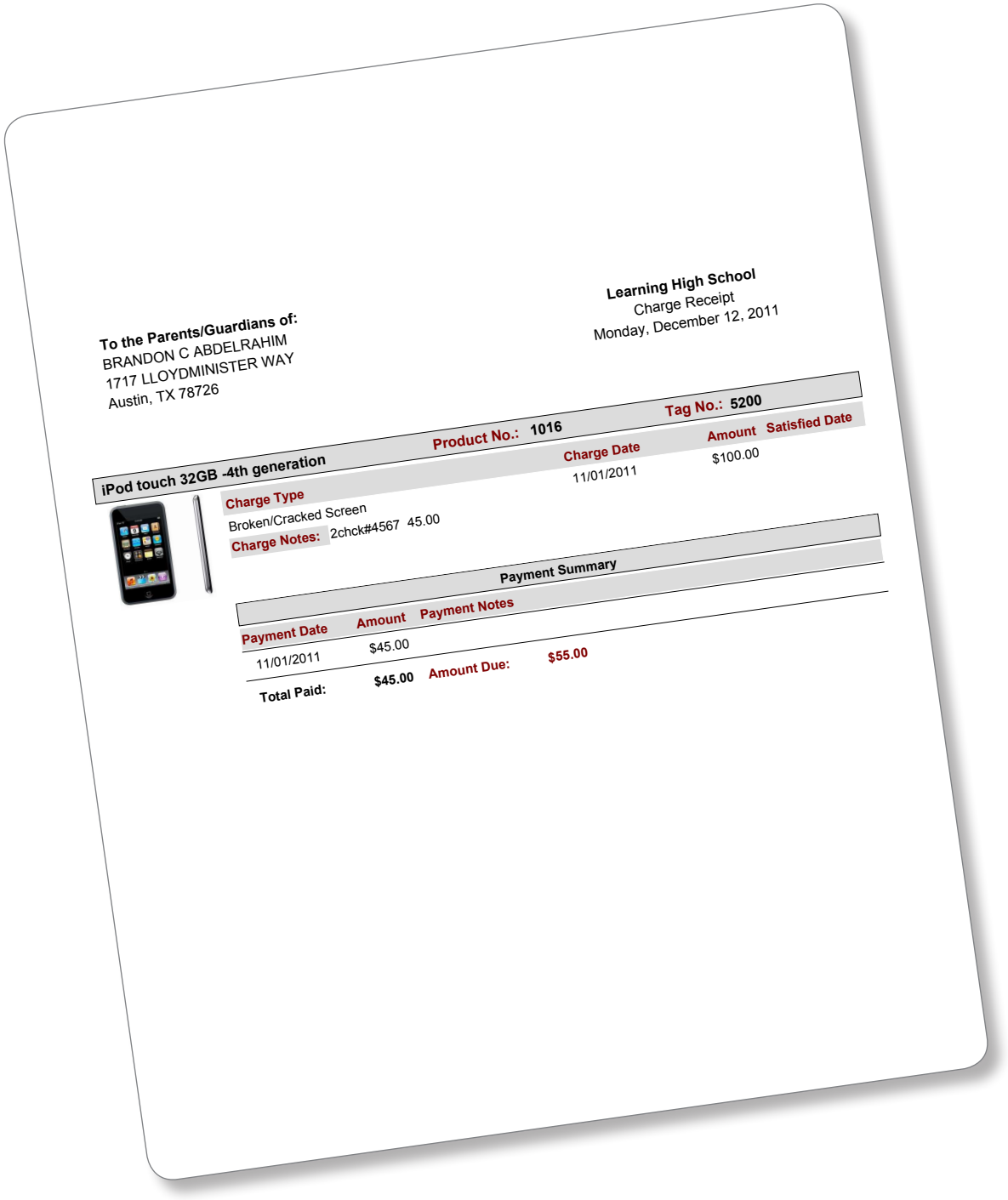
No Accessories Issued With This Item

Signature

Date

NOTES

Student Charge Receipt



To the Parents/Guardians of:
BRANDON C ABDELRAHIM
1717 LLOYDMINISTER WAY
Austin, TX 78726

Learning High School
Charge Receipt
Monday, December 12, 2011

iPod touch 32GB -4th generation — Product No.: 1016 — Tag No.: 5200

Charge Type	Charge Date	Amount	Satisfied Date
Broken/Cracked Screen	11/01/2011	$100.00	

Charge Notes: 2chck#4567 45.00

Payment Summary

Payment Date	Amount	Payment Notes
11/01/2011	$45.00	

Total Paid: $45.00 Amount Due: $55.00

NOTES

REPORT SAMPLES

Room Inventory Report

Room Number: 21
Room Name: Second grade classroom
Room Type: Classroom

Room Inventory Report
Learning Campus
Date Printed: 12/19/201
1

Staff Verification

StarBoard FX-TRIO-77

Manufacturer: Hitachi
Model: FX-TRIO-77
Hardware Type: Interactive Whiteboard
Department:
Price: $1,500.00
Other 1:
Other 2:
Other 3:

Product No.: 1061
SKU:
Projected Life: 5
Notes:

1061

Tags — **Count:** 1

5859

Accessories

2 Retractable stylus $10.99

The Tag Reading System 32 MB

Manufacturer: LeapFrog
Model:
Hardware Type: Reading System
Department:
Price: $44.95
Other 1:
Other 2:
Other 3:

Product No.: 1069
SKU: 20704
Projected Life: 3
Notes:

1069

Tags — **Count:** 24

5912 5913
5914 5915
5916 5917
5918 5919
5920 5921
5922 5923
5924 5925
5926 5927
5928 5929
5930 5931
5932 5933
5934 5935

Accessories

No Accessories Issued With This Item

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NOTES

REPORT SAMPLES

Staff & Student Barcode IDs

NOTES